CobbleStone Systems

User Manual

Contract Insight Enterprise User Manual

The Ultimate Web-based Contract Management Solution
Managing Contracts Just Got Easier!

Version 10.3

October 7, 2010

CobbleStone Systems Corp.

Leaders in Contract Management!

This documentation is dedicated to the software developers, contract professionals, CobbleStone Systems employees, and participating clients who worked hard to provide a robust, user-friendly, Enterprise Contract Management Software Solution.

Contents

About this Manual

This manual is intended to be used as a user's guide for Contract Insight Enterprise, training materials for Contract Insight, help materials for Contract Insight, and demonstration purposes.

Overview

Contract Insight Enterprise, Contract Management Software offers contract professionals, administrators, and key personnel the ability to easily track, renew, manage, and report on their contracts and other committals. Oftentimes, organizations have to engage in many contracts, such as, leases, maintenance, software license, intellectual property, telecommunication services, sub-contractor contracts, and many other risk types. Overtime it may be difficult to keep track of the renewals, risks, terms, review, and/or cancellation dates that make up the individual contracts. Moreover, a loss of productivity and increase expenses may arise from an inefficient contract administration process. Contract administrators may find that they are overwhelmed with the number of contracts they must track, report on, renew and cancel. They may find that it is inefficient to use a standard filing system via filing cabinets, network folders, and spreadsheets. CobbleStone's Contract Management Software provides a simple solution to solve these problems.

CobbleStone Systems' Contract Insight, contract management software provides an enterprise, web-based, solution to the contract management lifecycle process. It is installed on a network server and can be accessed by an Internet browser (like Microsoft Internet Explorer), and be used on a Local Area Network (LAN) and Wide Area Network (WAN) in a multi-user environment; and it can be hosted by CobbleStone and offered as a Software as a Service (SaaS).

Contract Insight is a highly robust and scalable contract management tool developed to industry standards utilizing advanced web and database technologies. It is based on years of market research, industry experts, client input, and feedback from thousands of users. It is an enterprise solution that offers unprecedented flexibility and functionality. It offers common functions such as; multi-level security, the ability to track key dates of contracts, notes, track sub-tasks and milestones, it provides advanced notification, e-mail alerts, template based creation/drafting, and it enables scanned images and files to be attached to each contract. It offers advanced functionality such as the ability to add user-defined fields, custom ad-hoc query tool, flexible searching, and full report builder.

Contract Insight enables organizations to effectively manage contracts, reduce contract management costs, and streamline workflow--all to save you and your organization money. Our proven system can save you thousands, even millions of dollars by automating the contract management process. Also, Contract Insight reduces your computer costs by utilizing our state-of-the-art web-based technologies.

Contract Insight is a complete tool for web-based contract and committal management. It is Internet-based software that enables users to access their contracts via a web-browser with no client PC installation. With anytime, anywhere access, you can work from the office, home or on the road with easy access to contract information, your remote workforce can access contract and diary information with the ability to enter new contracts, run reports, and perform text-based searches.

In the sections to follow you will find the System Requirements, Installation Procedures, as well as the User Guide.

System Requirements

Contract Insight is installed on a MS Windows network server and can be accessed by an Internet browser (like Microsoft Internet Explorer), and be used on a Local Area Network (LAN) and Wide Area Network (WAN) in a multi-user environment.

Server Requirements (in a non-hosted environment)

- Network Server with Pentium class processor or higher CPU.
- Microsoft Windows 2000 Server, or Windows 2003 Server, or Windows 2008 Server operating system running Internet Information Server (IIS 5.0 or better recommended); Virtual Servers are supported
- Microsoft SQL Server 2000, 2005, or 2008 required.
- RAM of 1 GB (or better) recommended
- 50 MB of hard-disk space required (or higher RAID 5 Recommended).
- VGA or higher-resolution monitor.
- Mouse or compatible pointing device.
- Network Interface Card.
- Backup tape recommended.
- Alternative power supply (UPS) recommended.

Workstation Requirements

Contract Insight is a fully web-based product. There is no need to install software on each PC workstation that will be utilizing the software. Any computer operating system can access the Contract Insight server as long as it is running a current web-browser (IE 4.0 or better recommended) (Firefox 2.0 or better supported). Wireless computers and hand-held devices that have an Internet browser can access Contract Insight as well.

Optional Recommendations

Scanner Hardware (Document feeder and industry class recommended)
Scanner Software (normally provided with the scanner)

Disclaimer of Warranty

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Good data processing procedure dictates that any program be thoroughly tested with non-critical data before relying on it. The user must assume the entire risk of using the program. ANY LIABILITY OF THE SELLER WILL BE LIMITED EXCLUSIVELY TO PRODUCT REPLACEMENT OR REFUND OF PURCHASE PRICE.

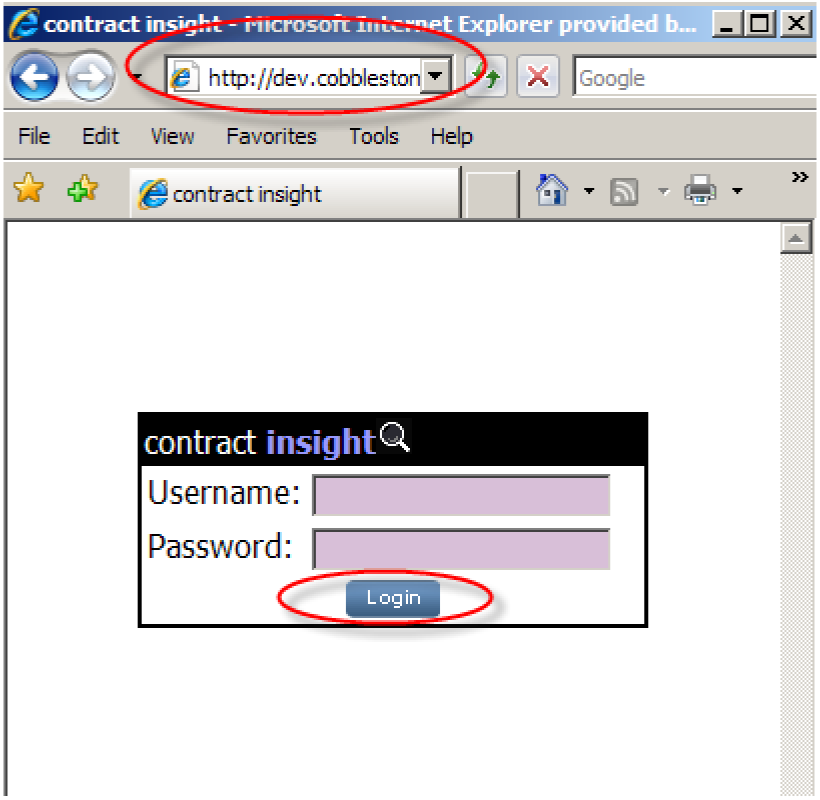
How to Use the System

Log In Screen

To log into Contract Insight open your web browser, connect to the Internet, and go to the URL web address site that was assigned to you upon your purchase (or obtained from your system administrator).

The log in screen will appear as seen below. Enter your user name and password that has been assigned to you by the contract administrator.

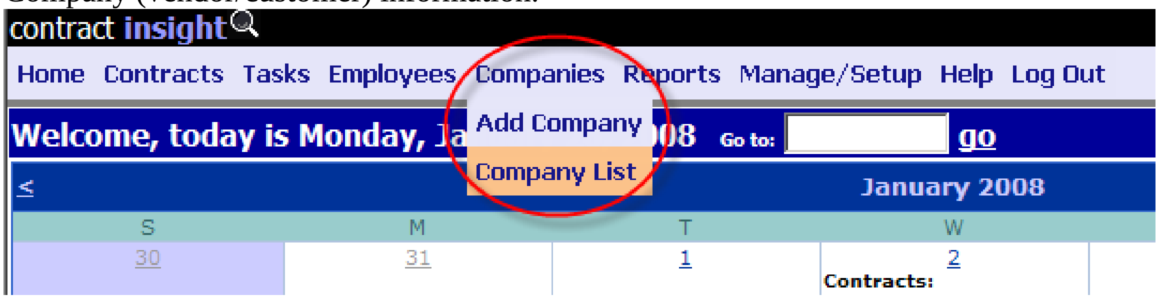
The administrator password is set by default as {username: contract | password: master}. It is recommended that the contract administrator change this password.



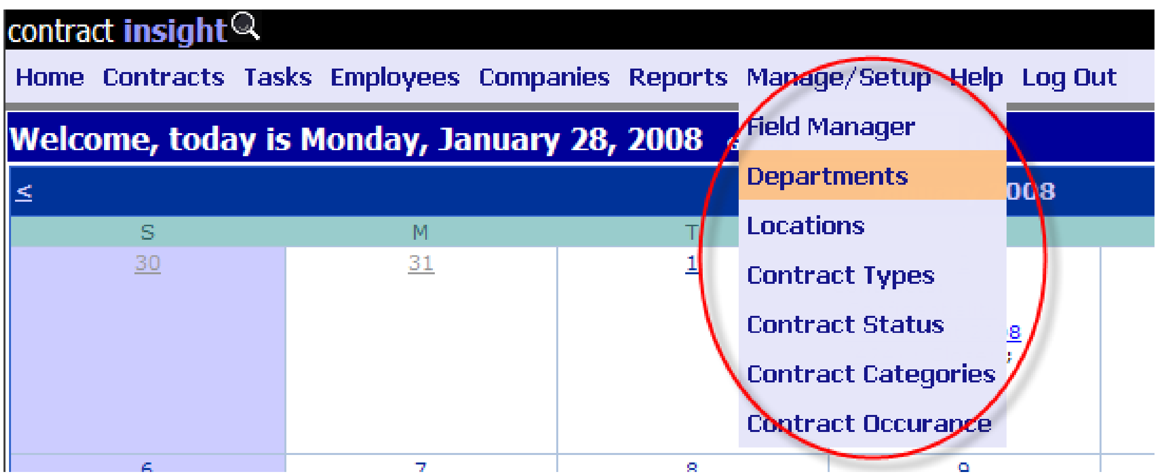
Navigation through the Interface

Navigating through the Interface

The top menu is the best way to navigate through Contract Management interface. It features links (similar to a website) that correspond to each topic and function of Contract Management. For example, the Company link will allow the user to add and view the Company (vendor/customer) information.



The Contracts, Companies (vendors/customers), Employees, Locations, and Departments links will show their respective options.



Result Grids Information

Understanding and Navigating the Result Grids

Contract Insight's newly updated result grids contain a wealth of information and application functionality. Gone are the days of a static result grid that could only show data in one dimension. In key data & result grids across the system, the following features are now available.

Contract ID	Title/Name	Start Date	End Date	Company Name		BudgetAmount
1785	Test Airling Contract	12/1/2009	12/1/2011	A Alpha Corp.	View	$0.00
1787	Test License Agreement	6/21/2010	6/21/2011	A Alpha Corp.	View	$0.00
1793	SFFCU Test	8/1/2010	7/31/2011	MJF Services	View	$413,000.00
1446	Test Consulting Agreement	2/1/2010	2/1/2011	A Alpha Corp.	View	$0.00

To properly utilize these grids to their fullest extent, first we will outline their different pieces of functionality.

1. Multiple custom sorting but just a few clicks
2. Filtering on each and every column
3. Drop-down results for attached files(not available on every grid)

Multiple Custom Sorting and Filtering Data

Each of these new grids can perform custom sorting on anywhere from one column to all columns.

To perform a custom sort on a grid, put the mouse over the column name you wish to sort by and click on it. The grid will refresh itself showing similar to the following

Contract ID	Title/Name ▲	Start Date	End Date	Company Name		BudgetAmount
1793	SFFCU Test	8/1/2010	7/31/2011	MJF Services	View	$413,000.00
1785	Test Airling Contract	12/1/2009	12/1/2011	A Alpha Corp.	View	$0.00
1446	Test Consulting Agreement	2/1/2010	2/1/2011	A Alpha Corp.	View	$0.00
1787	Test License Agreement	6/21/2010	6/21/2011	A Alpha Corp.	View	$0.00

Notice that in the example image, the column “Title/Name” is highlighted (selected) and there is a small arrow point up next to the name. This shows that the grid is currently being sorted by the column “Title/Name”.

Each column can be clicked to one of three (3) different states

1. The first click on a column will sort the column in ascending order

Contract ID	Title/Name ▲	Start Date
1793	SFFCU Test	8/1/2010
1785	Test Airling Contract	12/1/2009
1446	Test Consulting Agreement	2/1/2010
1787	Test License Agreement	6/21/2010

2. The second click on that same column will sort it in descending order

	Contract ID	Title/Name ▼	Start Date
>	1787	Test License Agreement	6/21/2010
>	1446	Test Consulting Agreement	2/1/2010
>	1785	Test Airling Contract	12/1/2009
>	1793	SFFCU Test	8/1/2010

3. The third click on that same column will remove its sorting

	Contract ID	Title/Name	Start Date
>	1785	Test Airling Contract	12/1/2009
>	1787	Test License Agreement	6/21/2010
>	1793	SFFCU Test	8/1/2010
>	1446	Test Consulting Agreement	2/1/2010

This process can be repeated for any columns you would like to add to the sorting of the grid.

Note: The sort order of the grid is always determined by the order in which the columns are clicked. Therefore, if “Title/Name” was already clicked to be sorted in ascending order, if the “Start Date” was then clicked once, it would sort in ascending order as well, however, it would be the second sort for the grid. The grid would first sort by “Title/Name”, then for any results with the same “Title/Name”, it would sort those according to their “Start Date”.

Multiple Custom Filtering

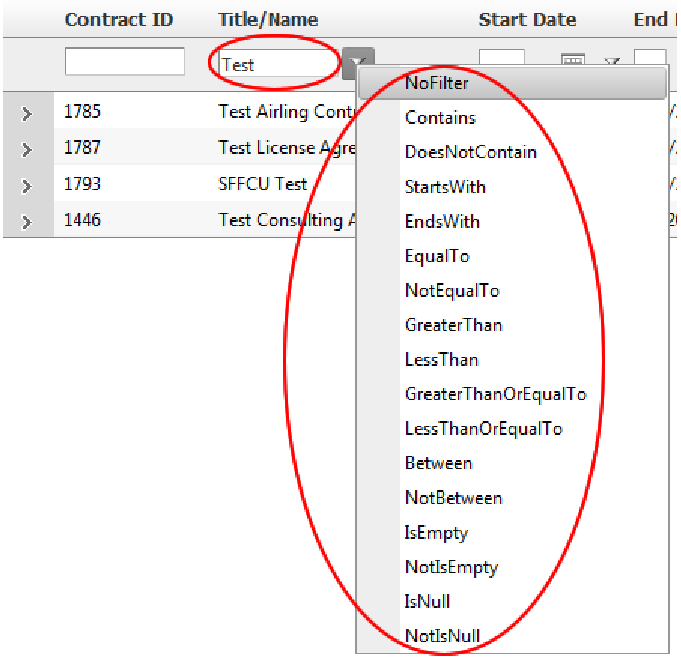
Each of these new grids can perform custom filtering on any of the columns in the grid.

To perform a custom filter on a grid, click on the text box underneath the column you wish to filter the grid by. Depending on the type of column you have selected, you will be able to filter the grid in different ways:

1. Primary ID: To filter by a primary id, all that is needed is to type in the ID you want to filter on and click off of the text box, the grid will take care of the rest (To remove this filter, erase the number in the text box and click off of the text box again)

	Contract ID	Title/Name	Start Date
	1785		
>	1785	Test Airling Contract	12/1/2009

2. Text Column: To filter by a text column, select the text box underneath the column's name, and type in a word or phrase you want to filter the grid by (Note: it does not have to be a full word). Once you have done this, click on the filter icon next to the text box as shown below

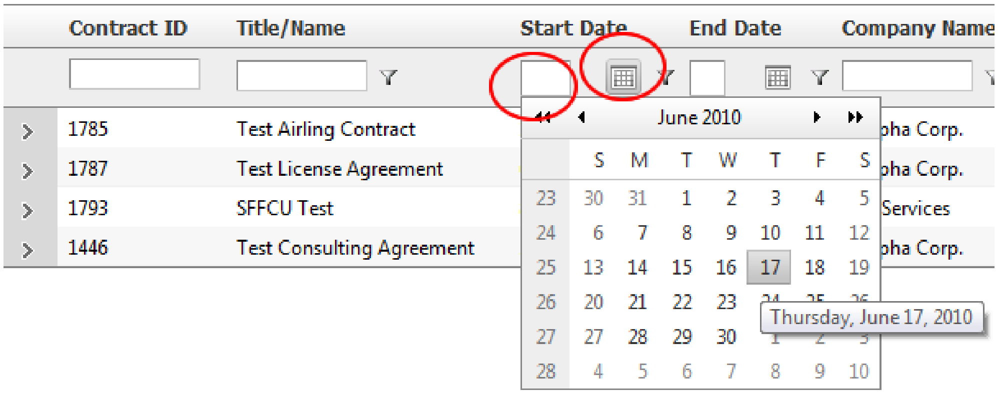


This will display a list of all the possible filter types for the column. If you know the exact word or phrase you are looking for, you can select the "EqualTo" filter. The grid's results will then be filtered to only those records who are exactly equal to what was typed in. (Conversely, "NotEqualTo"

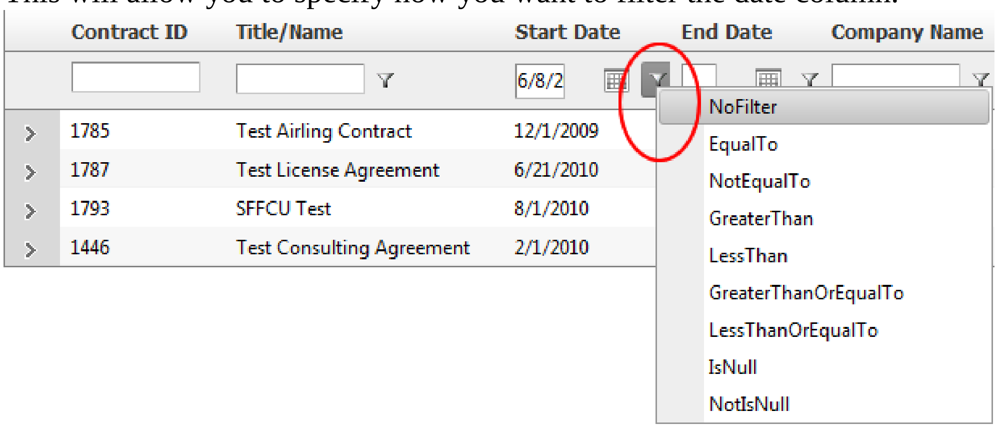
If you are not sure on the exact word, or want to filter on more than just exact, there are filters for "Contains"/"DoesNotContain" (These will look to see if each record contains the text provided anywhere in that column); as well as filters for "StartsWith"/"EndsWith" for checking if the column for each record starts with or ends with the text provided.

To clear a Text column filter, click on the filter icon underneath the column name and select "NoFilter" at the top of the list.

3. Date Column: To filter by a date column, click on the calendar icon underneath the column name to select a date from the calendar tool, or click on the text box to the left of it to type in a date manually.

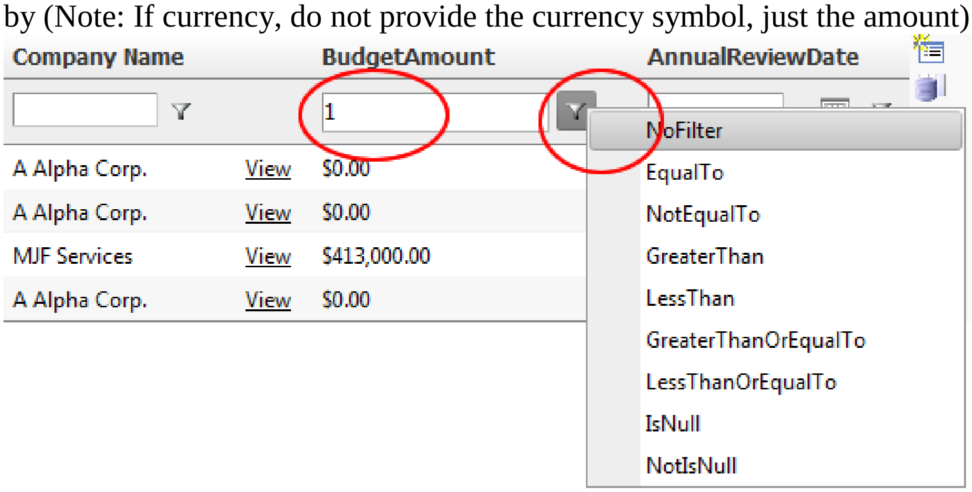


Once a date has been selected, click on the filter icon next to the calendar icon. This will allow you to specify how you want to filter the date column.



To clear a Date column filter, click on the filter icon underneath the column name and select “NoFilter” at the top of the list.

4. Currency/Decimal/Number Column: To filter by a number based column, click on the text box below the column name and provide the number or decimal to filter by (Note: If currency, do not provide the currency symbol, just the amount).



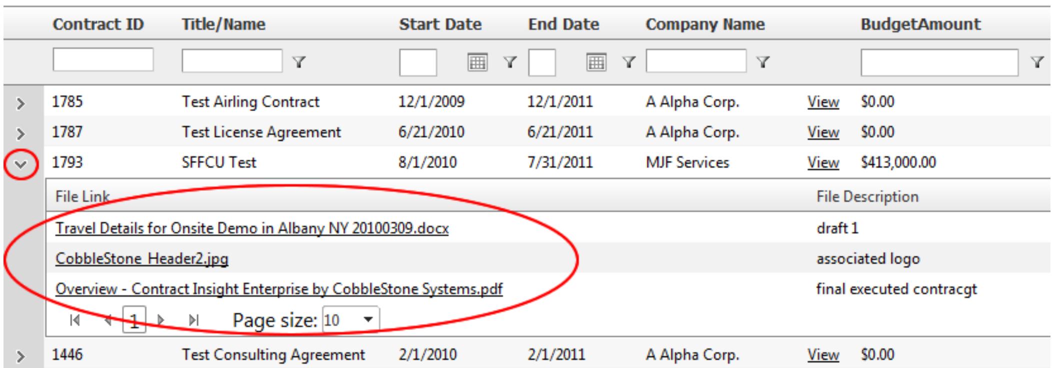
Once a number based amount has been provided, click on the filter icon next to the text box to specify how to filter the number based column.

To clear a Number based column, click on the filter icon underneath the column name and select “NoFilter” at the top of the list.

The grid can be filtered by as many of the columns as needed, however when multiple columns are provided with a filter, the grid will always check to find those results that match each and every one of the filters provided.

Drop-down results for attached files
The Contract related grids contain the additional functionality to view all their attached files in-line within the grid.

To view these files for a result within the grid, click on the left hand arrow on that row. This will populate the list of attached files for that record (if any).



When viewing these files, you can click on the name to directly open up the file, as well as see any provided description about the file as well as the date it was attached into the system.

Dashboards

Accessing your dashboards
Upon first logging into the system you will be taken to your “My Calendar” page due to the fact that no dashboard has yet been configured for you. Once you have configured at least your first dashboard, each subsequent time you log into the system you will be taken to your “My Dashboards” page.

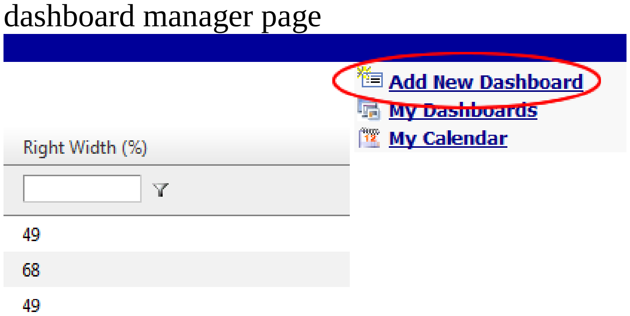
To access you’re dashboards page or your dashboard manager, you can click on either of the two right hand menu links on the calendar page, or under the “My” top menu item, select “Dashboards” or “Dashboard Mgr.”

The Dashboard Manager

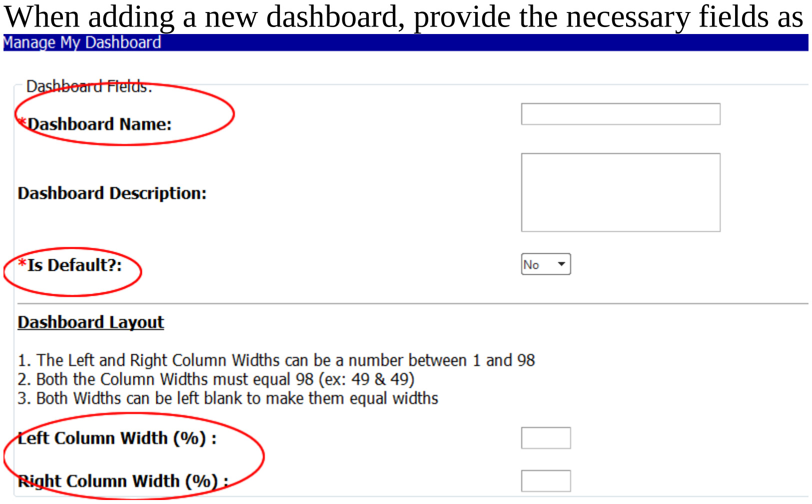
Your dashboard manager provides a list of all the dashboards you have configured for yourself along with the ability the manage them or delete any that are not your current default dashboard. Here is some information regarding the columns:

1. Dashboard Title: This is the title/name given to your dashboard
2. Is Default: Specifies if the dashboard is set as your current default dashboard (your default dashboard will initially be shown when you log in)
3. Left Width: The size of the left hand column of your dashboard
4. Right Width: The size of the right hand column of your dashboard

To create a dashboard, select "Add New Dashboard" from the right hand menu on the dashboard manager page

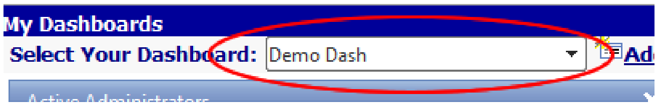


When adding a new dashboard, provide the necessary fields as shown below

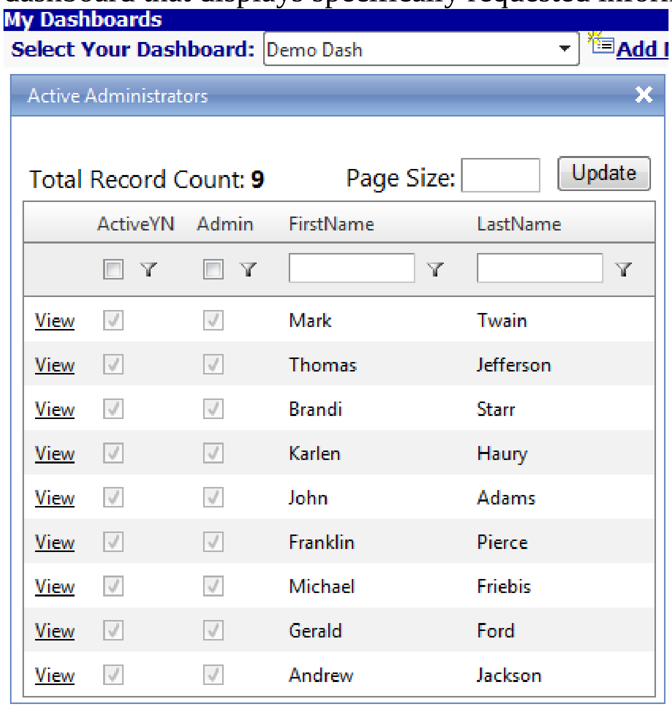


Your "My Dashboards"

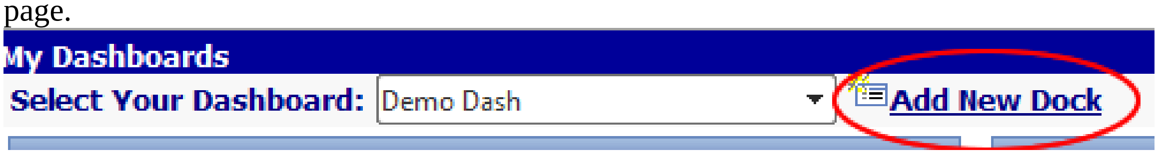
The My Dashboards page will initially display your default dashboard. All of your other dashboards will be available to you from the drop down in the upper left hand part of the screen



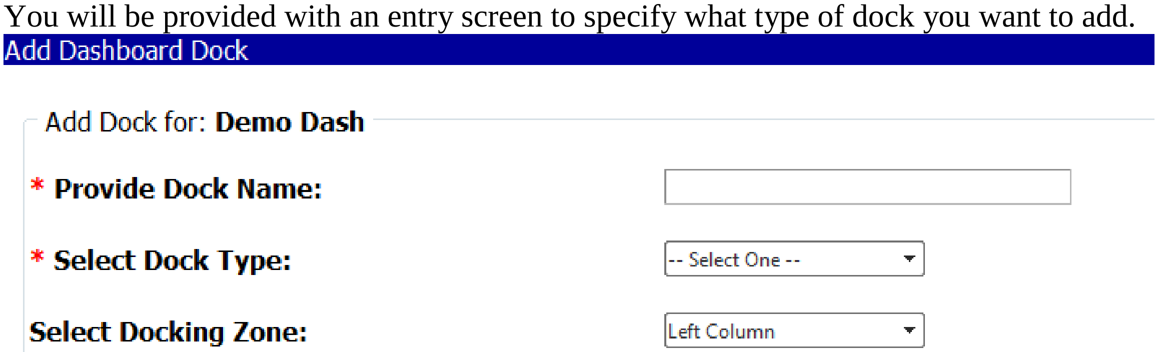
With each of your dashboards, you are able to add up to 20 docks. A dock is a part of the dashboard that displays specifically requested information. Here is an example of a dock:



To add a new dock to your dashboard, click on the "Add New Dock" link at the top of the page.

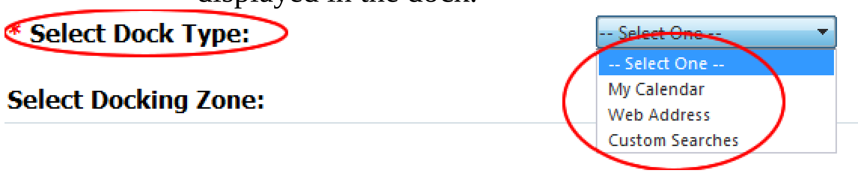


You will be provided with an entry screen to specify what type of dock you want to add.



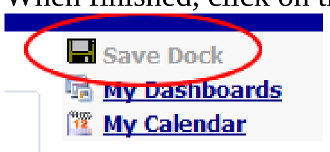
There are three different types of docks that can be added to a dashboard:

1. Your “My Calendar” from your calendar page
   a. When adding your “My Calendar”, the calendar will be displayed in the specified dock.
2. A direct link to a web address
   a. When adding a web address, the page you specified will load in the dock.
3. A Custom Search (Custom Searches are explained later)
   a. When adding a custom search, the results of custom search will be displayed in the dock.



Once you have specified which type of dock you want to add, all that is left to do is to select if it will be displayed in the right or left column (Note: docks can be moved around on the “My Dashboards” page after they are added to the dashboard).

When finished, click on the Save Dock link in the right hand menu



This will save your dock to the dashboard and return you to your “My Dashboards” page.

Company Information

Add Your Company Information

As the contract administrator of Contract Insight, the first step is to add your company information. This information will be used to pre fill data as needed in contract templates.

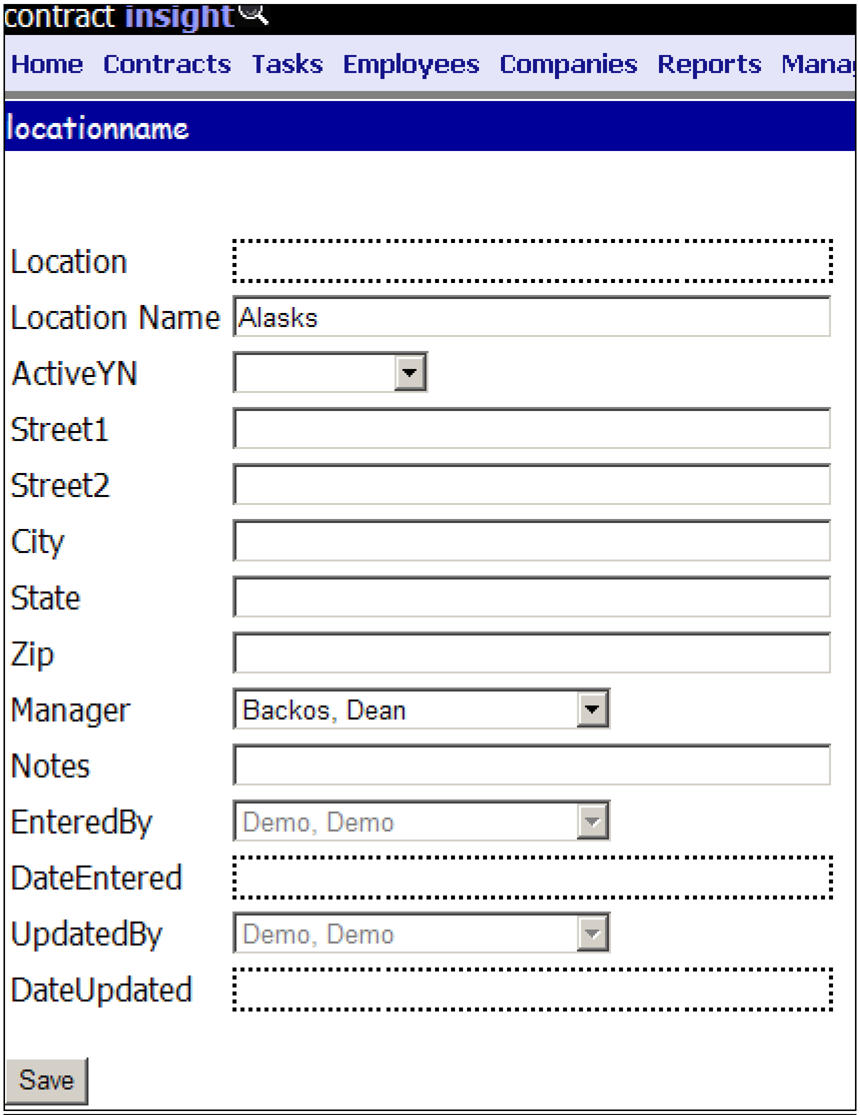
We recommend entering data into the system in the following order:

1. Add Your Locations (if needed)
2. Add Your Departments
3. Add Your Employees
4. Add Your Vendors
5. Add Your Contract Types, Status, and Categories
6. Add Your Contract

Location Management

Add Locations

Contract Insight supports the ability to assign contracts to your organization's locations. The Location list can be administered by 'Admin' users. To add locations to the location list, select "Locations" from the Manage/Setup menu, then select "Add". Enter the appropriate location information into the Location Form displayed below.

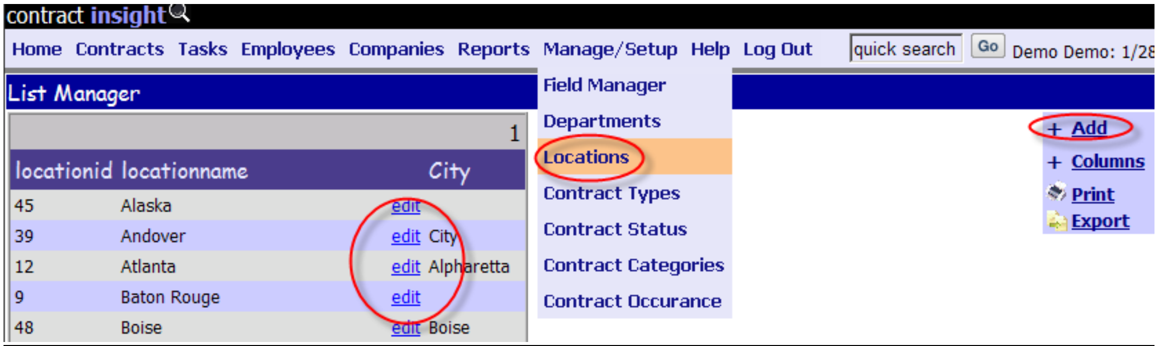


Select “Save” to save the location information.

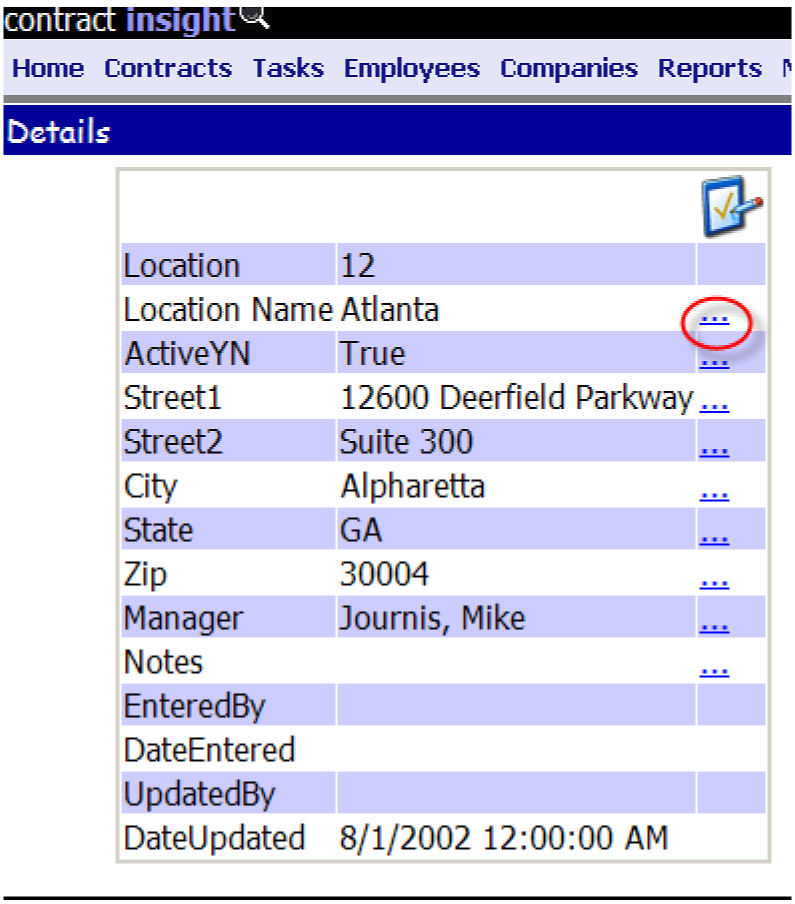
Repeat the steps above for all of your locations. NOTE: at least one location should be in the location list.

View and Edit Locations

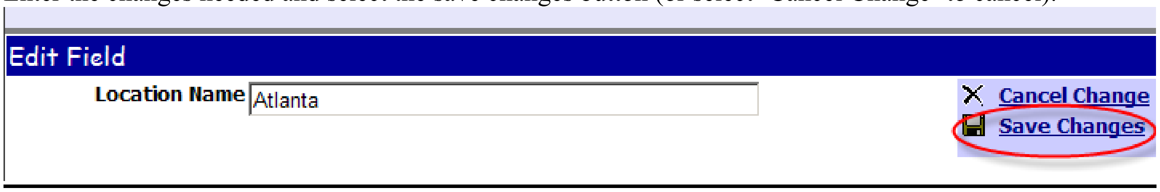
To view or edit the locations entered into the system, select Manage/Setup, select "Locations" from the Location menu. Next, select 'edit' for the name of the location that needs to be viewed or edited.



Upon selecting the name of a location from the location list, the location details form will appear. Select the '…' link to edit any of the field data.



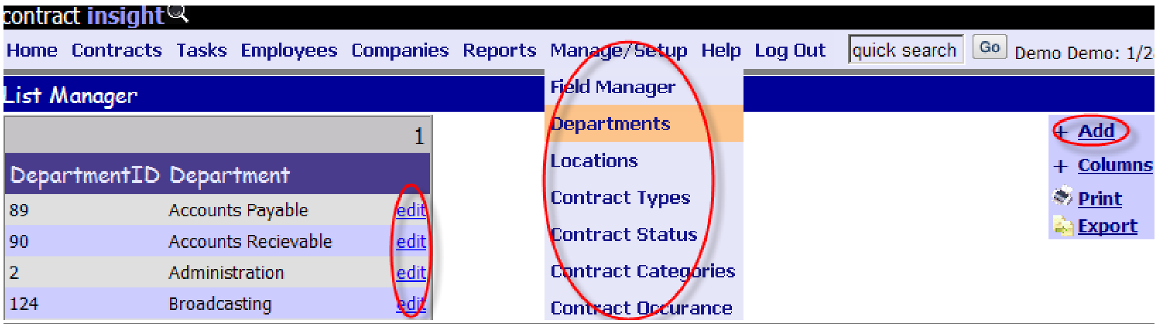
Enter the changes needed and select the save changes button (or select 'Cancel Change' to cancel).

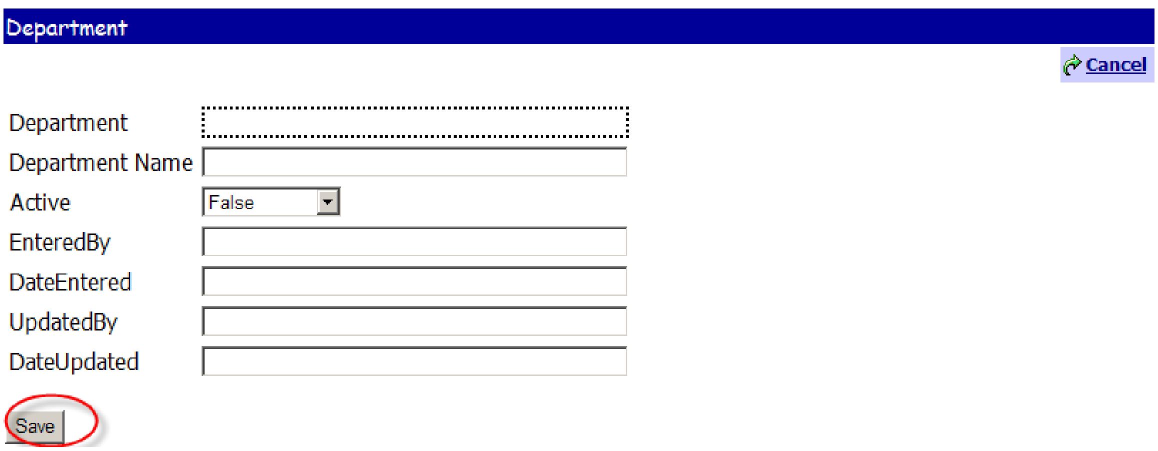


Department Management

Add Departments

Contract Insight supports the ability to assign departments to your contracts and to your employees. Only admin users can manage departments (or other authorized users). To add or manage departments select “Departments” from the ‘Manage/Setup’ menu, then select “Add”. Enter the appropriate location information into the Department Form displayed below.



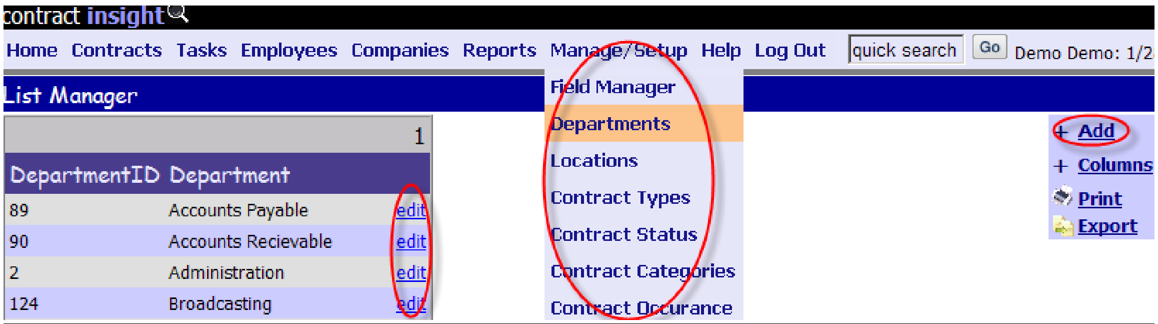


Select “Save” to save the information entered.

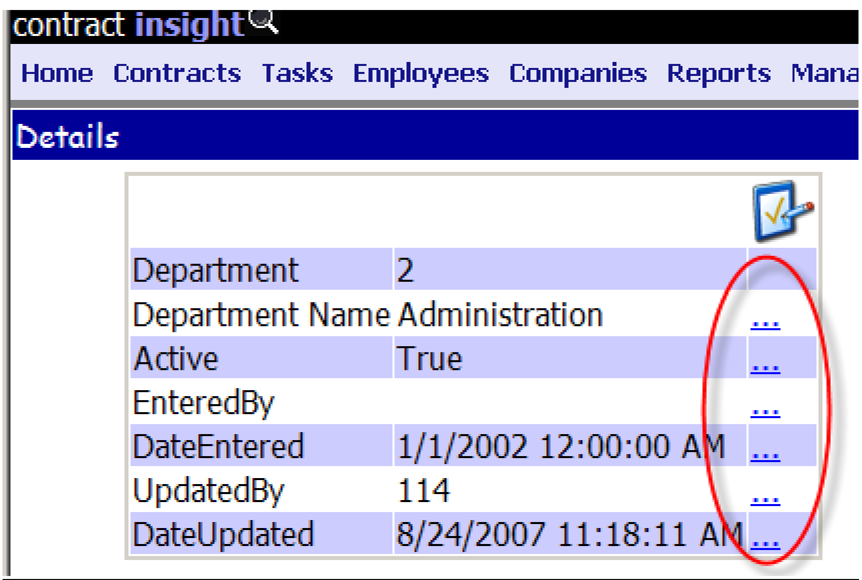
Repeat the steps above for all of your company’s departments.

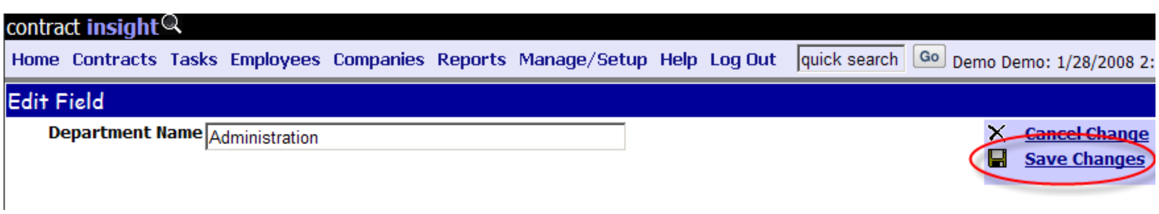
View and Edit Departments

To view or edit the departments entered into the system, select "Departments" from the 'Manage/Setup' menu. Next, select edit next to the name of the Department that needs to be viewed or edited.



Upon selecting the name from the list, the details form will appear.



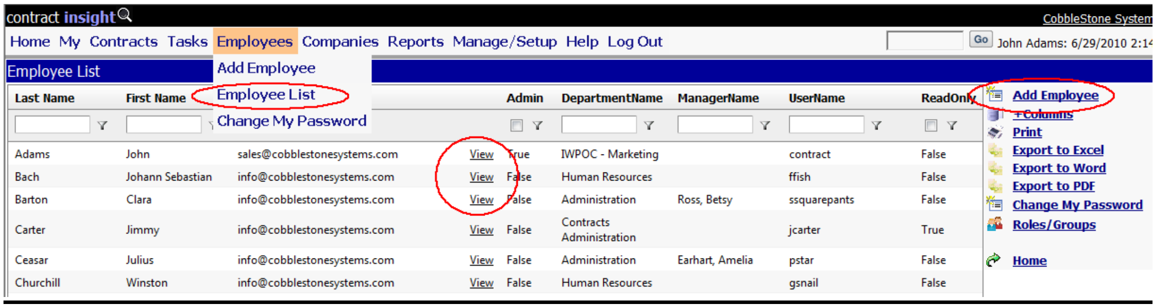


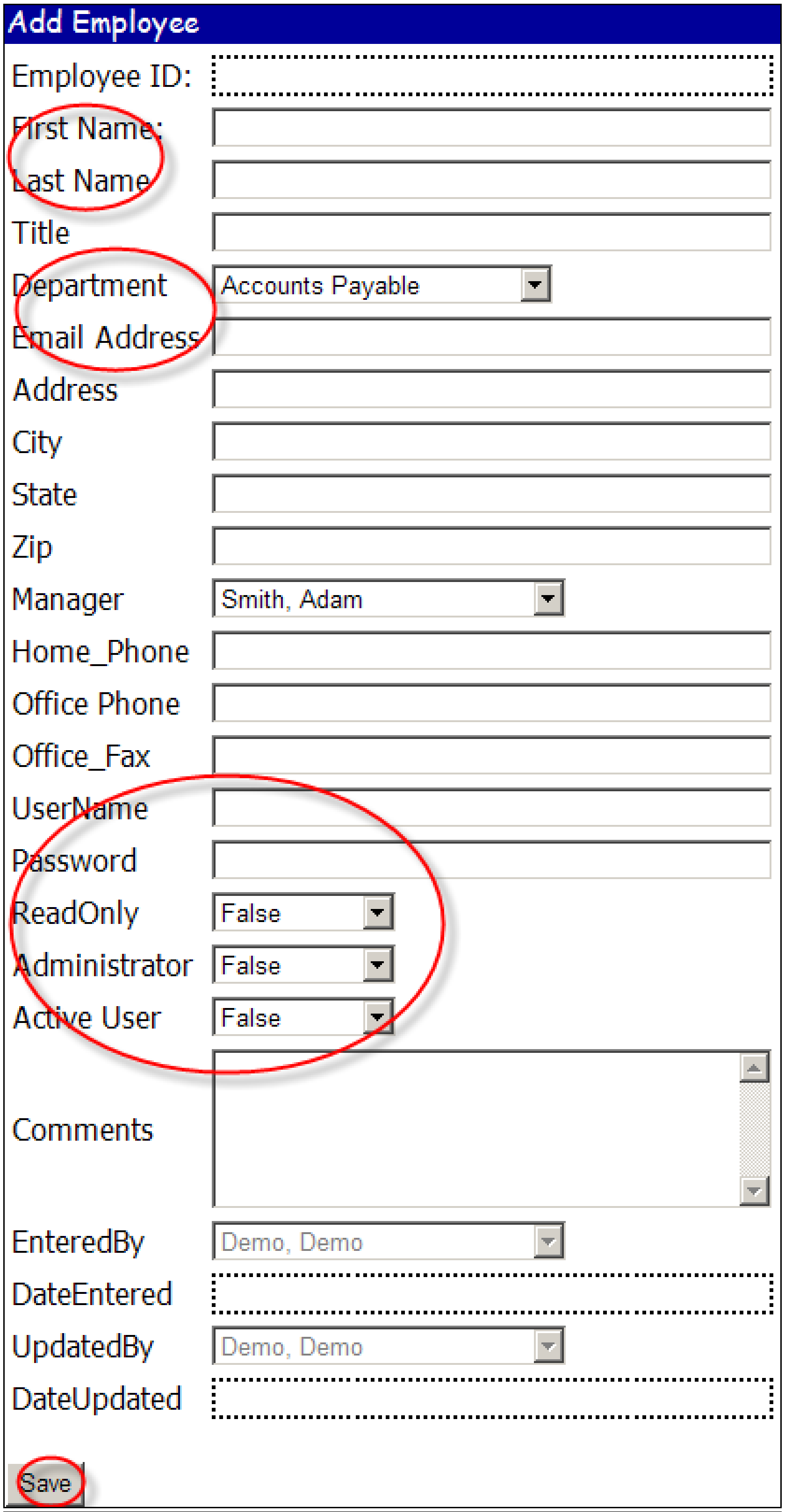
Select the '…' link next to the field that needs editing, make your changes and select 'save'.

Employee and User Management

Add Employees and Users

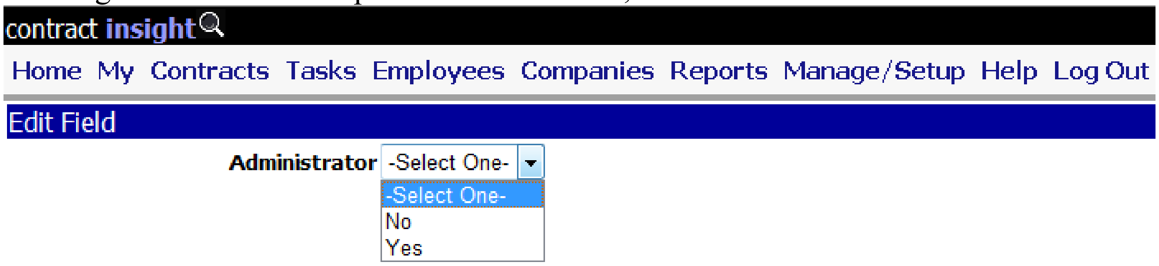
To add new employees and users you must have administrative permissions. An employee becomes a user when the employee entered is assigned a username and password and the appropriate permissions. To add a new user, select “Add Employee” from the “Employee” menu as seen below. Then enter the new employee and user information and save the new user information.




Add Employee
Employee ID:
First Name:
Last Name
Title
Department
Accounts Payable
Email Address
Address
City
State
Zip
Manager
Smith, Adam
Home_Phone
Office Phone
Office_Fax
UserName
Password
ReadOnly
False
Administrator
False
Active User
False
Comments
EnteredBy
Demo, Demo
DateEntered
UpdatedBy
Demo, Demo
DateUpdated
Save

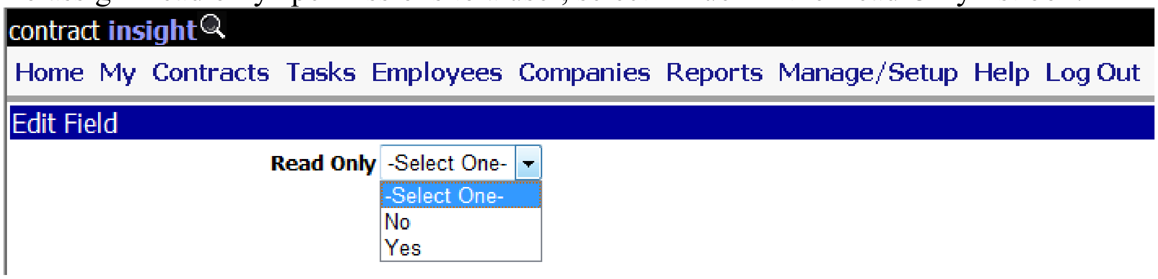
Note.

To assign "administrative" permissions to a user, select "True" in the Admin list box.



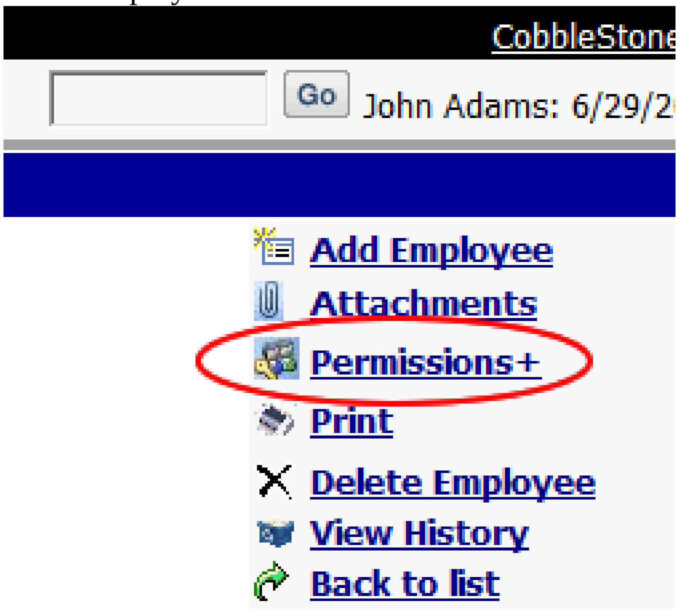
The Administrative permissions are set to "false" as a default.

To assign "read only" permissions to a user, select "True" in the Read Only list box.



The Read Only permissions are set to "false" as a default.

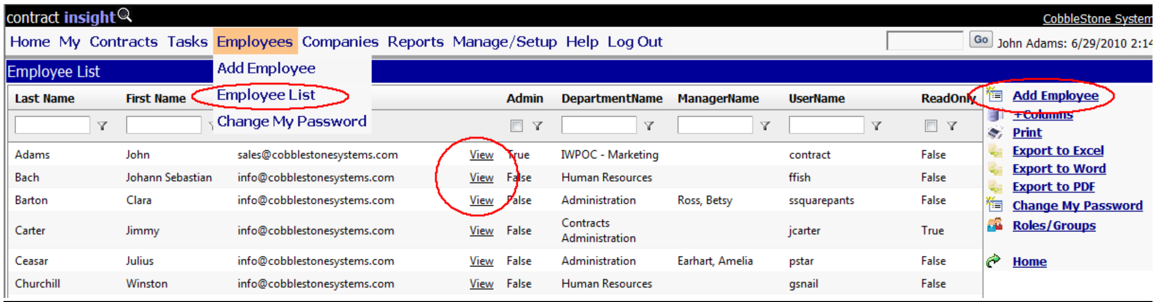
Note: The Read Only permission is a depreciated aspect of controlling permissions. For accurate and proper control of a user's permissions please utilize the "Permissions+" link on the employee details screen.



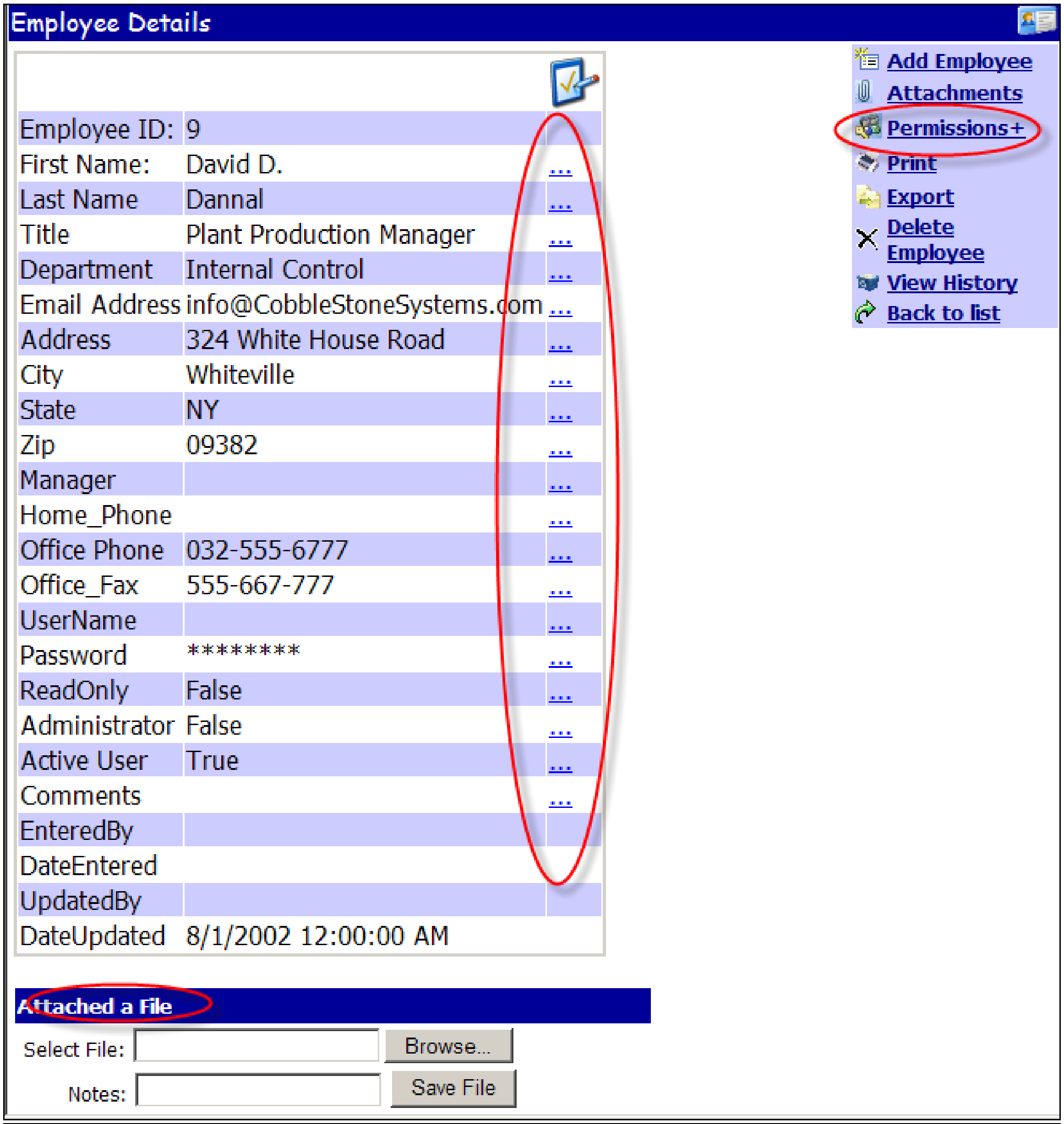
Select "Save" to save the Employee and User information. After saving a new user, you may add additional permissions and settings to an employee's profile.

View and Edit Employee and User Information

To view or edit Employee and User information select “Employee List” from the “Menu”. The employee entered in the system will be displayed as follows.

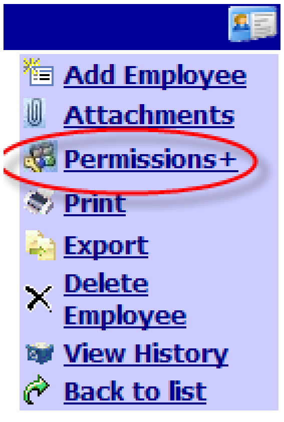


Upon selecting the name from the list, the details form will appear.

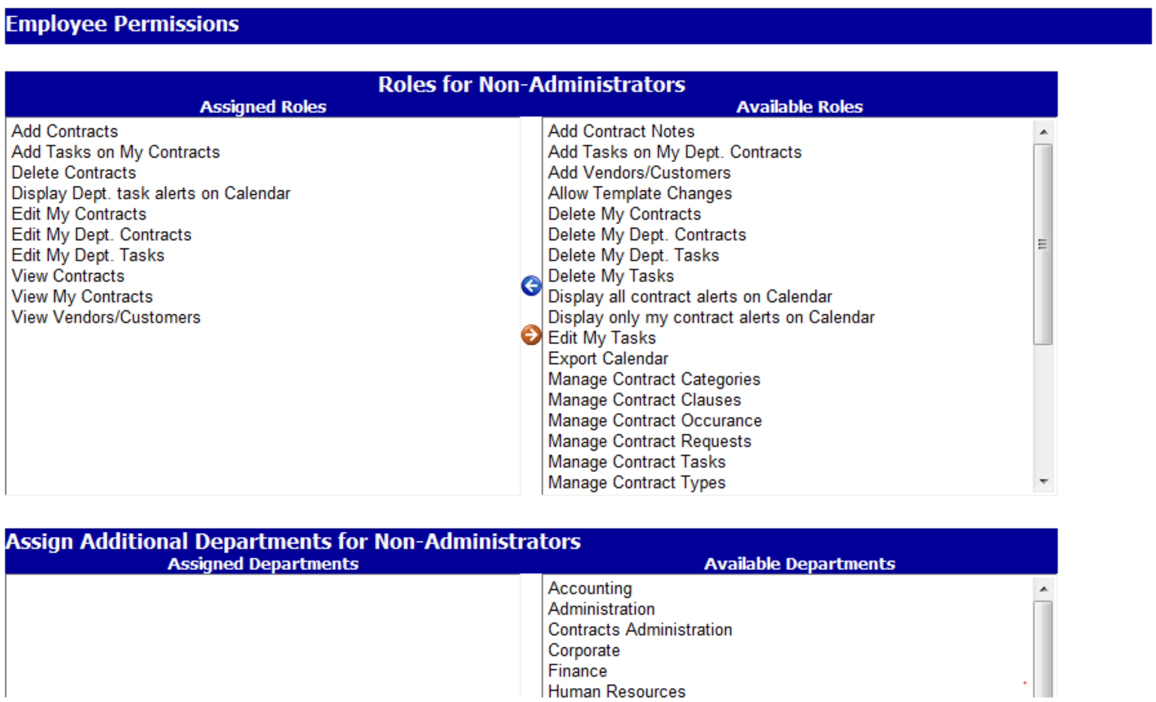


To edit a field value on the Employee screen, select the '…' link (above).

To assign other user permissions select the 'Permissions' link.



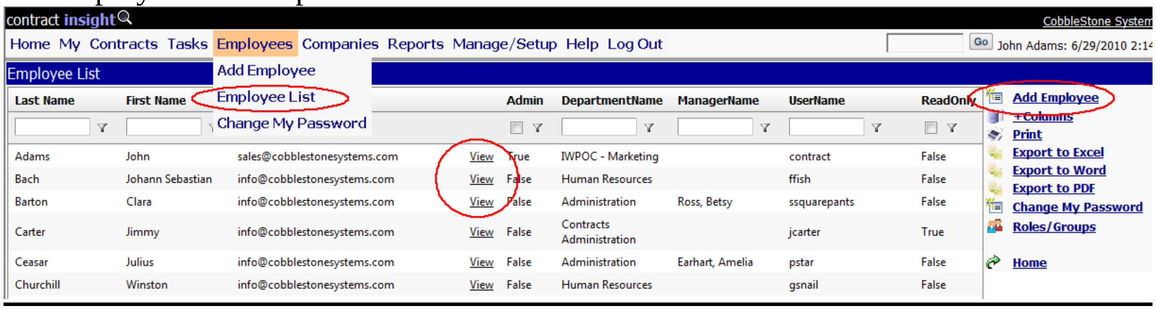
Users that have admin set to false will only be enabled to view contracts and access the system features based on the employee's (users') permissions set via the screen below.



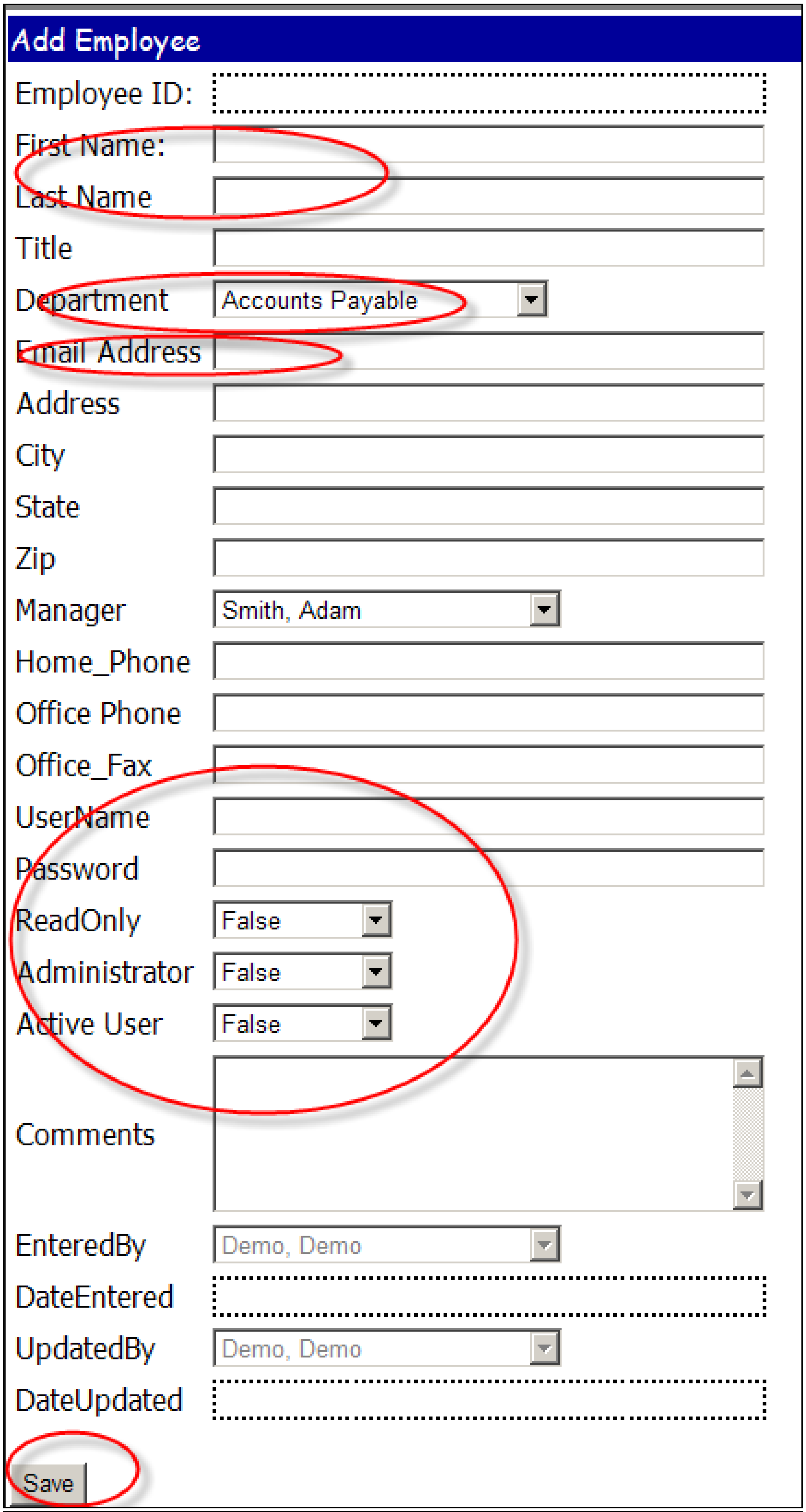
Notes about permissions:
An employee that has the 'admin' field set to true will have full rights in the system to modify, manage, and delete all set up tables as well as all contracts. Users that have admin set to false will only be enabled to view contracts in their departments. Non-admin users may be assigned additional security rights via the 'Permissions' link on the employee screen. A user can be assigned to multiple departments (if needed) via the 'Assign Additional Departments..' portion of the employee's permission screen (seen above)

Employee and User Management

Below is an overview of the security and user modes that are available in Contract Insight.
To assign users and employee permissions: select the ‘Add Employee’ link located under the Employees menu option.



Next, enter the employee’s name, department, username, password and other security settings as required. More details related to Employee and User security is described below.


Add Employee
Employee ID:
First Name:
Last Name
Title
Department
Accounts Payable
Email Address
Address
City
State
Zip
Manager
Smith, Adam
Home_Phone
Office Phone
Office_Fax
UserName
Password
ReadOnly
False
Administrator
False
Active User
False
Comments
EnteredBy
Demo, Demo
DateEntered
UpdatedBy
Demo, Demo
DateUpdated
Save

Admin Users:

The highest security level is entitled, an ‘Admin’ (administrator) user. An ‘Admin’ user is indicated by assigning the ‘Admin’ field on an employee record to ‘True’. Admin users can see and manage all contracts, vendors, employees, control lists, ad hoc reports, and custom fields, with full delete and modify access (regardless of which security mode the system is set to). All other users that are not ‘Admin’ users (or those users with the ‘Admin’ setting set to ‘false’) are referred to as ‘non-admin’ users in this document.

Non-admin Users:
Non-admin users are those users that have the ‘Admin’ setting in the employee screen set to ‘False’ (or ‘No’). Non-admin users have restricted access in the system depending on which security mode the system is set to. [Each security mode is discussed later in this document.] Non-admin users cannot add, delete, or modify: Vendors, Employees, and control lists (such as Types, Categories, Departments, Types, and Locations) unless specific permissions are assigned via the ‘Permissions’ menu on the Employee details screen for each particular non-administrator. Non-admin users are permitted to view (in read only mode) all control lists such as: Departments, Company List (Vendors/Customers), Categories, Types, and Locations. The user’s view permission are based on the individual’s permissions assigned on the Employee’s details screen via the ‘Permissions’ menu.

System Security Modes:
Contract Insight offers several security modes, Individual mode and Departmental mode and both are set by an individual’s permission screen. Changing the security mode of the system is discussed below.

The first security mode is 'Individual' security mode. The second security mode is 'Departmental'. The administrators of the system can edit employee’s security by selecting the ‘Permissions’ menu on the Employees Details screen.

Individual Security Mode:
If a user has the permission assigned entitled ‘View My Contracts’ (or Edit or Delete MY Contract), then the user is said to have individual security. The 'Individual' security assignment enables an organization to limit access by user account. This means that ‘non-admin’ users can only access contracts that are assigned to them (specifically, the Employee field on the Contract record is set to the user’s name). Each non-admin user in this mode will be limited to accessing those contracts assigned to them via the Employee field on each contract. Non-admin users cannot add, delete, or modify: Vendors, Employees, and control lists (such as Types, Categories, Departments, Types, and Locations).

Departmental Security Mode:
When a user has the ‘View My Department’s Contracts’ (or edit or delete ‘my department’ contracts), then the user is said to have 'Departmental’ mode. This enables an organization to limit non-admin user access by the department that the users and contracts are assigned to. For example, this mode enables an administrator to assign users to their appropriate departments. As each contract is entered in the system, the contract is

also assigned to a department. The ‘Departmental’ mode only allows non-admin users to view and access contracts that are assigned to the departments they belong too. Each non-admin user account can be set to a ‘read only’ status by setting the ‘Read Only’ field on the employee record to ‘True’. The ‘Read Only’ setting will limit the user by NOT enabling the user to change contract data (ultimately, removing the save and delete buttons from the Contract screens). Non-admin users cannot add, delete, or modify: Vendors, Employees, and control lists (such as Types, Categories, Departments, and Locations).

Note: User’s may be assigned both modes via their permission screens.

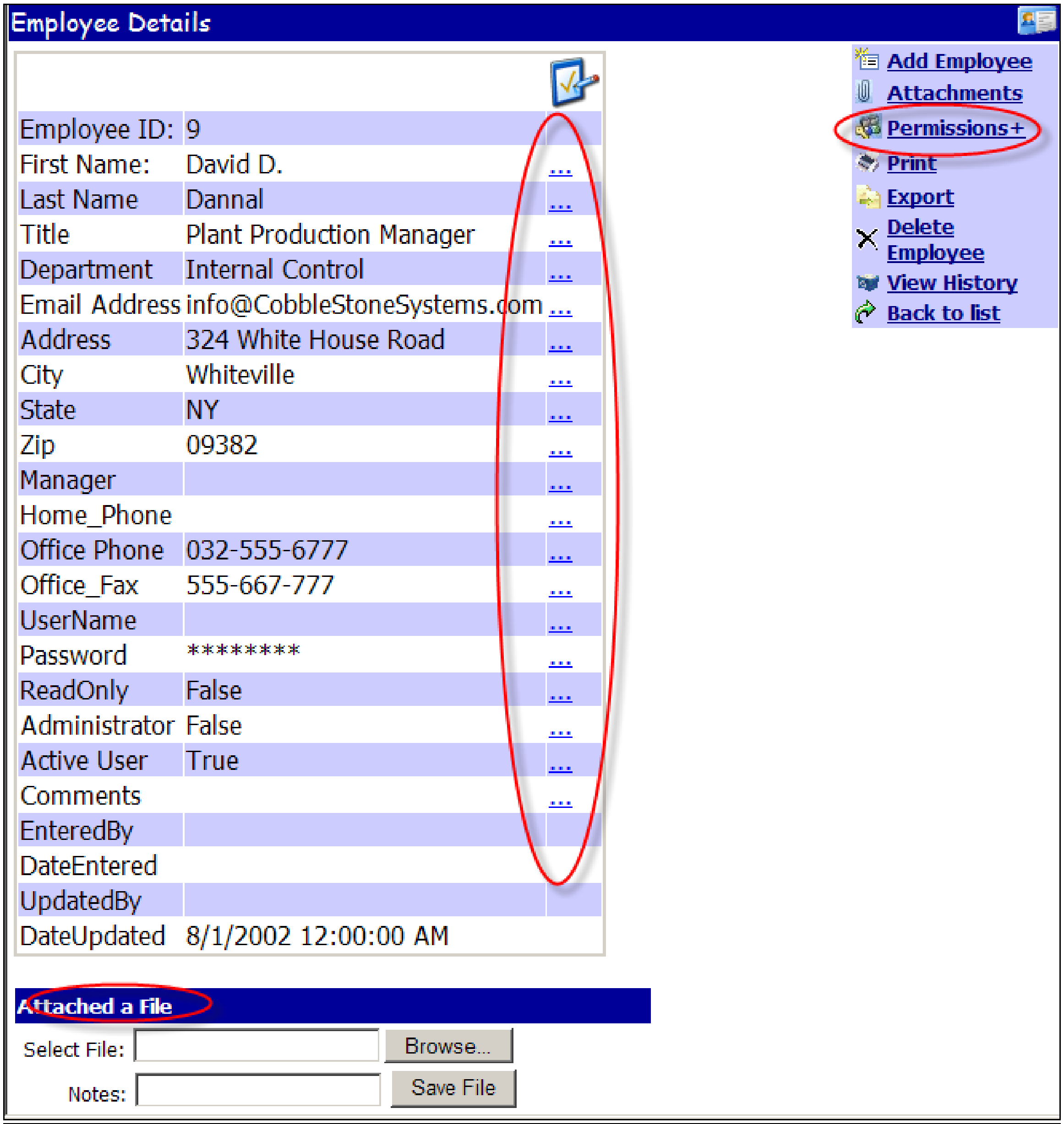
Additional User Security Options via Permissions

The Additional User Security Options offer the administrators of the system to assign additional management authority to ‘non-admin’ level users.

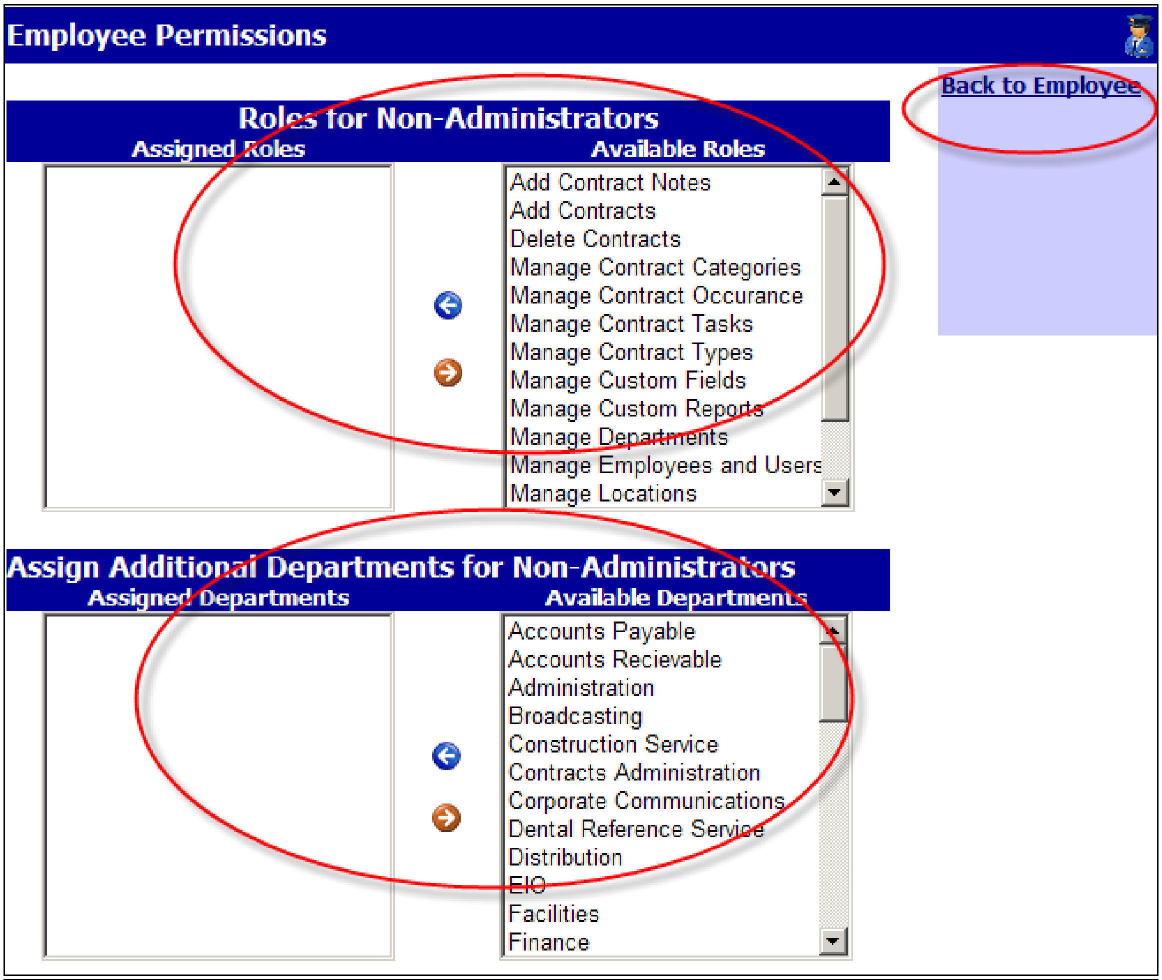
- Non-admin users may be assigned additional security rights via the „Permissions‟ link on the employee screen.
- Non-admin users are those users that have the “Admin” setting in the employee screen set to ”False” (or “No”).
- Non-admin users have restricted access in the system depending on which security mode the system is set to.
- Non-admin users cannot add, delete, or modify: Vendors, Employees, and control list’s (such as Types, Categories, Departments, Types, and Locations) unless specific permissions are assigned via the “Permissions” menu on the Employee details screen for each particular non-administrator.
- Non-admin users are permitted to view (in read only mode) all control lists such as: Departments, Company List (Vendors/Customers), Categories, Types, and Locations. The user’s view permission is based on the individuals permissions assigned on the Employee’s details screen via the “Permissions” menu.

Additional Users Security Options are assigned to a user on a per user basis via the Employee Manager screen via the ‘Permissions’ menu item. The following steps describe how to access the Additional User Security Options:

1. Log into Contract Insight as an ‘Admin’ level user
2. Select the Employee from the Employee Lists that require additional security options
3. Select the ‘Permissions’ menu item (as seen below).



4. Next, select the security role from the available security list (see below) that you want to assign to the selected user and click the ‘Add/Remove’ arrow button. This will add the security role select to the ‘assigned security’ list box.



5. To remove security roles from a user's profile, select an 'assigned security' role in the 'assigned security roles' list box and click the 'Add/Remove' arrow button.

To assign a user to multiple departments use the same steps as above, however, assign the correct departments in the department area.

Available Security Roles

1. The 'Manage Employees and Users' security role permits a user to add, edit, and delete employees/users from the system.
2. The 'Manage Vendor and Customers' security role permits a user to add, edit, and delete Vendors and Customers.
3. The 'Manage Contract Categories' security role permits a user to add, edit, and delete Contract Categories.
4. The 'Manage Contract Types' security role permits a user to add, edit, and delete Contract Types.
5. The 'Manage Contract Tasks' security role permits a user to edit and delete Contract Tasks that are assigned to Contracts that are part of the 'departments' that the user is assigned to.

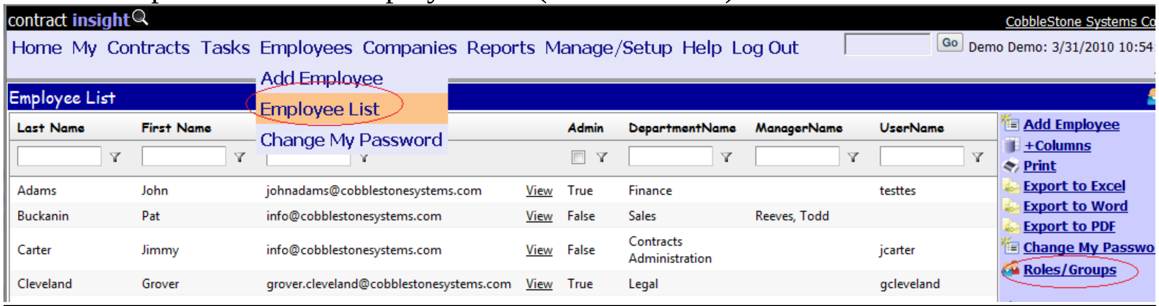
Non-Admin Roles Available in ContractInsight	Description for Non-Admin Users
Add Contract Notes	Allows users to add contract notes on the contracts they can view
Add Contracts	Allows users to add contracts in their department
Add Tasks on My Contracts	Allows users to add contract tasks on the contracts they can view whereby the contract employee field is assigned to the user
Add Tasks on My Dept. Contracts	Allows users to add contract tasks on the contracts they can view whereby the contract department field is assigned one of the user's departments
Add Vendors Customers	Allows a user to add vendors/customers in the company list
Allow Template Changes	Allows a user to edit a merged template on contracts they can view
Delete Contract Audit Notes	Allows users to delete notes on contracts they can view
Delete Contracts	Allows users to delete contracts they have access to
Delete My Contracts	Allows users to delete contracts when the employee field of the contract is set to the user's employee account
Delete My Dept. Contracts	Allows users to delete contracts when a contract's department is set to a user's department
Delete My Dept. Tasks	Allows users to delete Tasks on a contract when the contract's department is set to the user's department
Delete My Tasks	Allows a user to delete tasks if the task is assigned to the user
Delete Vendors/Customers	Allows user to delete a vendor / customer from the companies list
Display all contract alerts on Calendar	Displays all contract related expiration alerts on the users calendar for which they have access to
Display Dept. task alerts on Calendar	Displays all of the user's departmental tasks on the user's calendar page
Display only my contract alerts on Calendar	Displays only the user's contract alerts whereby the employee field on the contract screen is set to the current user
Edit My Contracts	Enables a user to edit contracts whereby the employee field on the contract is set to the employee/user and provided the employee can view the contract
Edit My Dept. Contracts	Enables a user to edit contracts whereby the department field on the contract is set to the employee/user' department and provided the employee can view the contract
Edit My Dept. Tasks	Enables a user to edit contracts Tasks whereby the department field on the contract is set to the employee/user' department and provided the employee can view the contract
Edit My Tasks	Enables a user to edit contracts Tasks whereby the employee field on the Task is set to the employee/user' and provided the employee can view the contract
Edit Vendors/Customers	Enables a user to edit/modify a vendor/customer via the company list
Export Calendar	Enables a user to export tasks assigned to them on their calendar. Export is provide via iCalendar/vCalendar format.
Manage Contract Categories	Permits a user to add, edit, and delete system related Categories via the Manage/Setup administration menu.
Manage Contract Occurrence	Permits a user to add, edit, and delete system related Occurrence via the Manage/Setup administration menu.

Non-Admin Roles Available in ContractInsight	Description for Non-Admin Users
Manage Contract Requests	Enables a user to review Contract Requests that were submitted via the Contract Menu
Manage Contract Tasks	Permits a user to edit and delete Contract Tasks that are assigned to Contracts that are part of the "departments" that the user is assigned to.
Manage Contract Types	Permits a user to add, edit, and delete system related Contract Types via the Manage/Setup administration menu.
Manage Custom Fields	Permits a user to add, edit, and delete user-definable fields via the Field Manager located from the Manage/Setup administration menu.
Manage Custom Reports	Permits a user to add, edit, and delete Custom Report searches
Manage Departments	Permits a user to add, edit, and delete system related departments via the Manage/Setup administration menu.
Manage Employees and Users	Permits a user to add, edit, and delete employees/users from the system.
Manage Locations	Permits a user to add, edit, and delete system related Locations via the Manage/Setup administration menu.
Manage Status List	Permits a user to add, edit, and delete system related Status items via the Manage/Setup administration menu.
Manage Vendors and Customers	Permits a user to add, edit, and delete system related Vendors/Customers
Search all contracts in System	Enables a user to search all contracts stored in the system and overrides other permissions limiting the user based on department; typically this permission will also have one of the View Contracts permissions above as well assigned to the user's account
Search only my contracts in System	Enables a user to search only their contracts stored in the system (whereby the contract's employee field is assigned to the current user); typically this permission will also have one of the View Contracts permissions above as well assigned to the user's account
View all Contracts	This will allow them to view all contracts in the system
View Contracts	This will allow the 'view' link to show when they search for contracts (we recommend this is on for all users)
View Contracts in My Depts.	This will enable a user to view all contracts when a contract is assigned to the user's department(s)
View My Contracts	This will allow a user to view contracts when a contract is assigned (as the employee) to the user's account/name.
View Vendors/Customers	This will allow a user to view a vendor/customer's details page from the vendors list

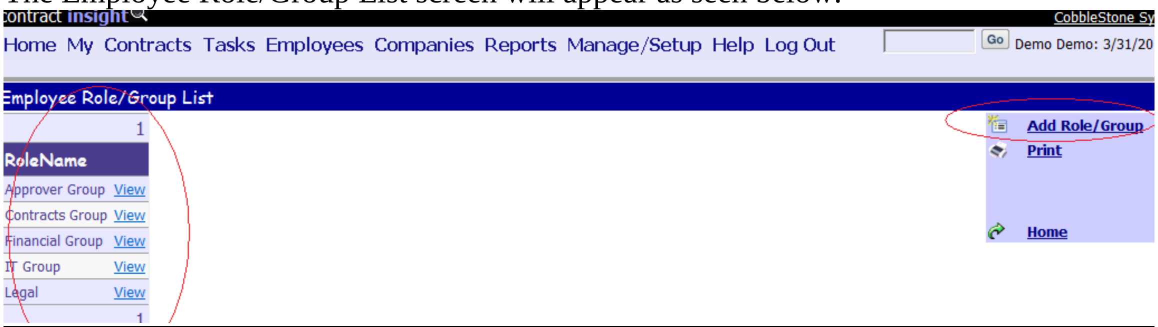
Add and Configure Employee Groups/Roles

The system supports the optional ability to assign employees/user to a group (or role). This is helpful when creating a task alert (discussed earlier) allowing an admin user to configure and assign tasks (and workflows) to not only an individual employee (user), but additional to assign the task to a group (or multiple people assigned to a group/role).

To add a new employee Group, log into the system as and admin user, next, select the Roles/Group menu on the Employee List (as seen below).

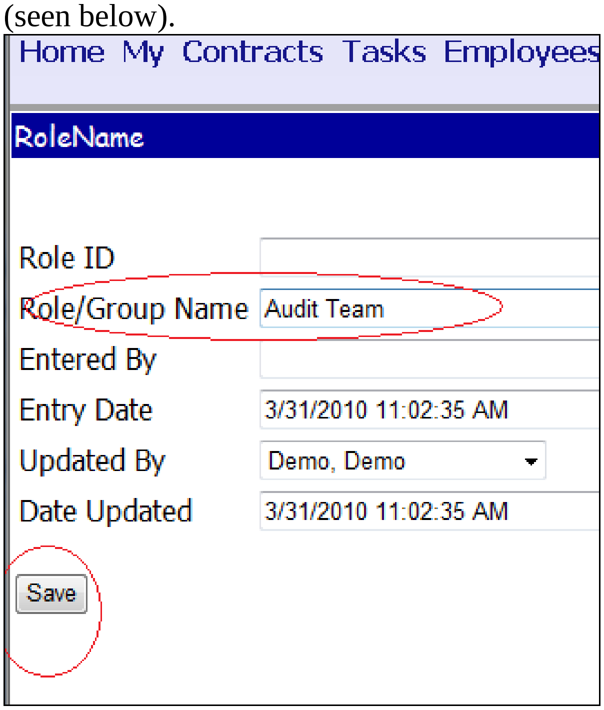


The Employee Role/Group List screen will appear as seen below.



The add a new Employee Role/Group, first select the Add Role/Group menu link on the right hand menu (seen above).

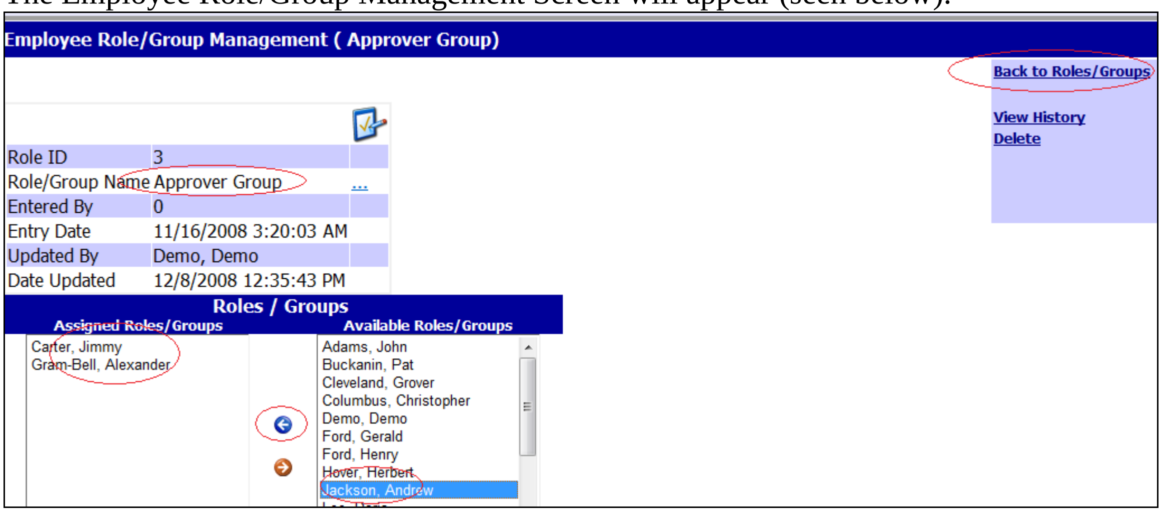
Next, enter in the Role/Group Name that you want to create and select the Save button (seen below).



The system will save the new Group Name and return you to the Group List screen (seen below)

Next, to assign / add employees to this group, select the 'View' link next to the group name (seen above).

The Employee Role/Group Management Screen will appear (seen below).



To assign or add employees to the new group, select the Employee name from the right side list box and then select the arrow (blue) to assign the employee. Repeat this process to assign multiple users to the group. To remove employees, select the employee name on the left box, and then select the red arrow to remove. To return to the prior screen, select the Back to Roles/Group menu on the left (seen above).

Now you may add tasks and configure workflow that allows to assigning of a task to a group.

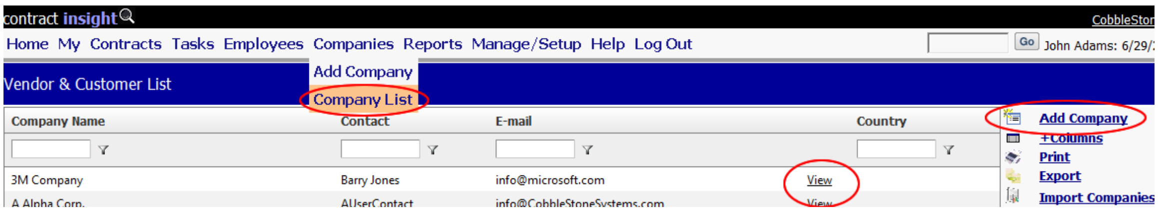
To delete a group, select the Delete link (seen above).

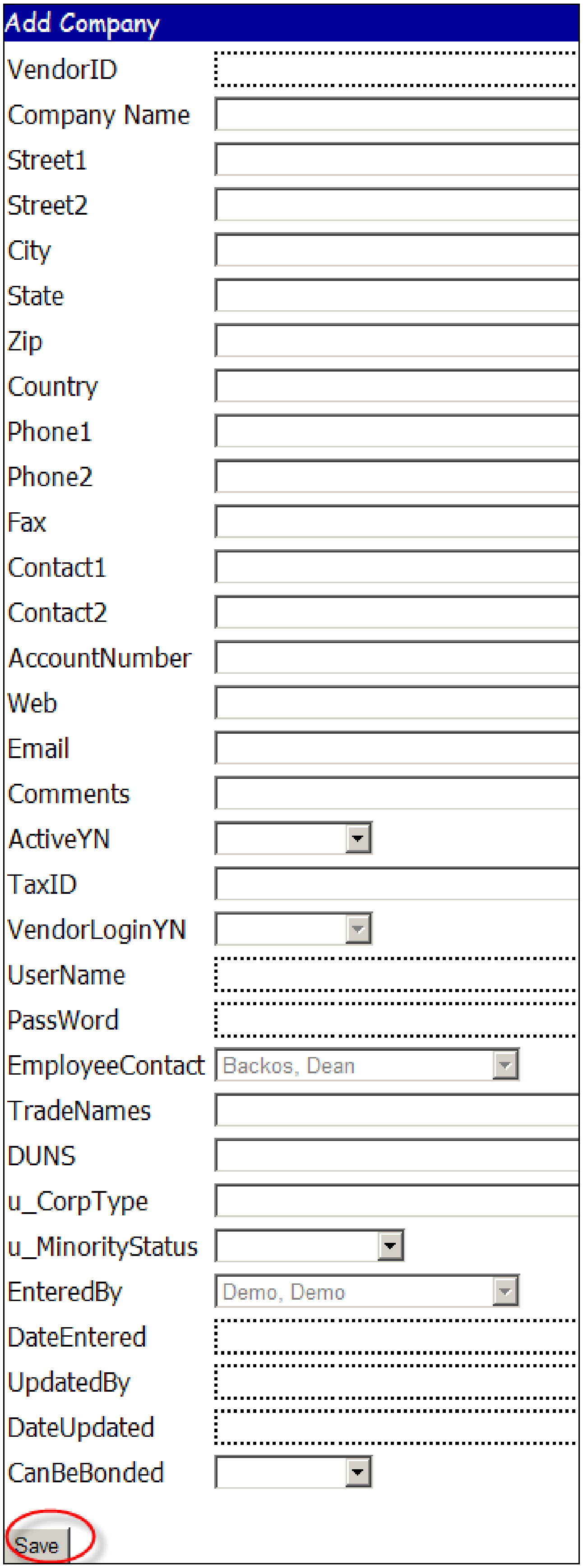
Vendor/Customer Management

Contract Insight features contact management functionality to keep track of your external contacts, entitled Companies (Vendors/Customers). This is designed to keep track of Vendors and Customers that your organization does business with.

Add Vendors/Customers

You must have the appropriate administrative permission to add contacts to the system. To add vendors and customers to the system, select "Add Company" from the Companies (Vendor/Customers) menu. The Vendor/Customer input form will appear. Enter the appropriate data in and select save.




Add Company
VendorID
Company Name
Street1
Street2
City
State
Zip
Country
Phone1
Phone2
Fax
Contact1
Contact2
AccountNumber
Web
Email
Comments
ActiveYN
TaxID
VendorLoginYN
UserName
PassWord
EmployeeContact
Backos, Dean
TradeNames
DUNS
u_CorpType
u_MinorityStatus
EnteredBy
Demo, Demo
DateEntered
UpdatedBy
DateUpdated
CanBeBonded
Save

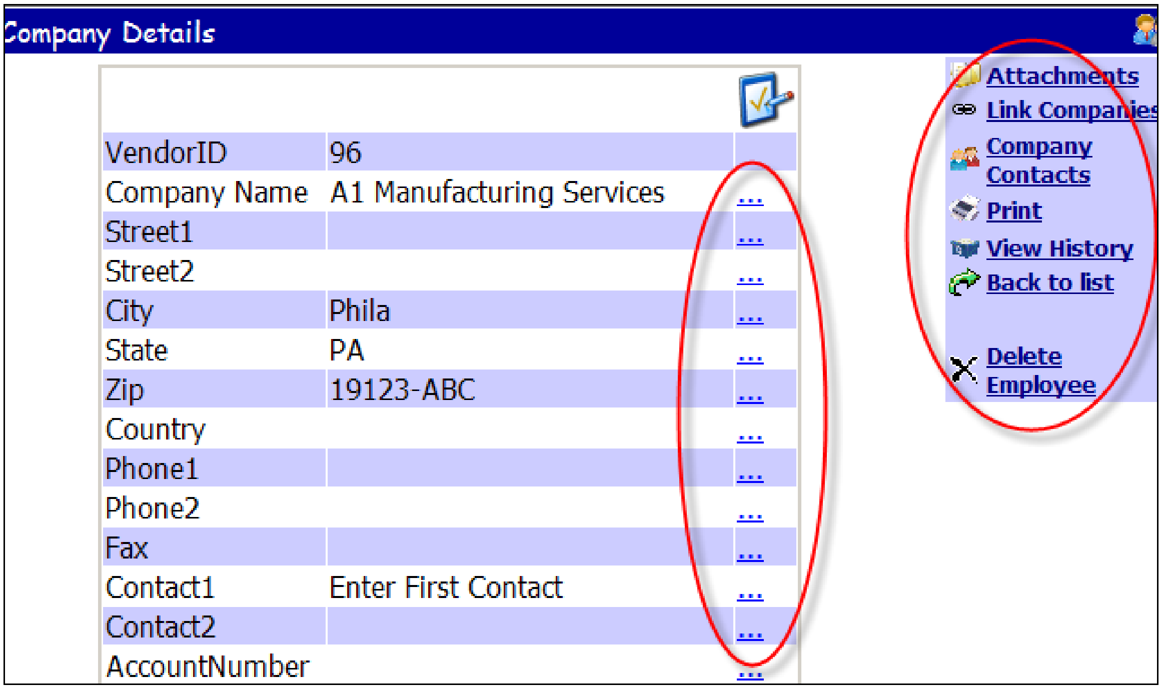
After entering in the Company Information, be sure to select the 'save' button.

Note. To grant a vendor or a customer with the ability to log into the system for contract negotiation and view only rights enter a username and password in the appropriate fields.

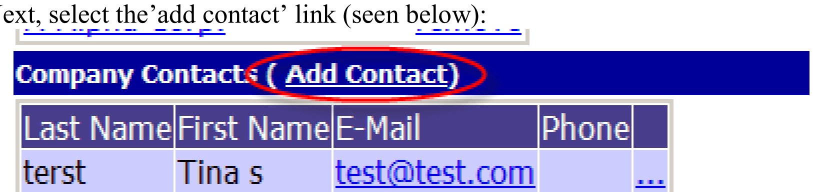
User Name	vendorusername	...
Password	********	...

Add Additional Contacts to Vendors/Customers

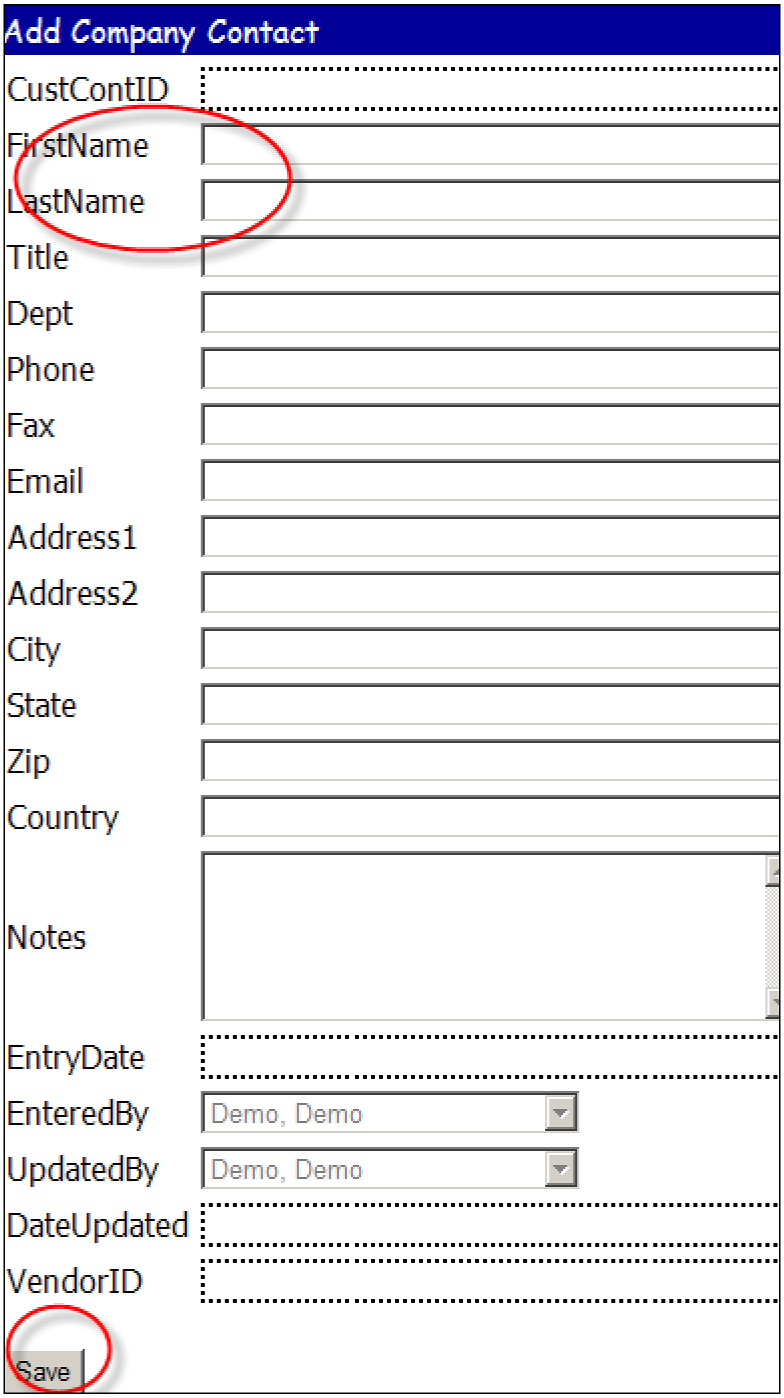
Contract Insight supports the ability to add unlimited Contacts to Vendors and Customers. To add contacts to Vendors/Customers select "Company Contacts" from the Vendor/Customer details screen.



Next, select the'add contact' link (seen below):



The addition contact screen will appear as follows:



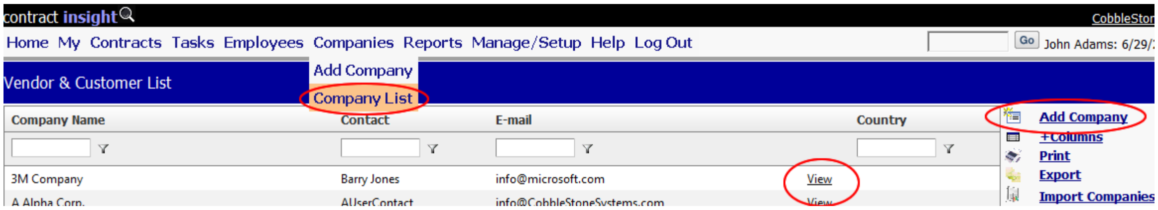
Be sure to enter the contact name and select save.

Each contact entered will appear at the bottom of the Vendor/Customer detail screen.

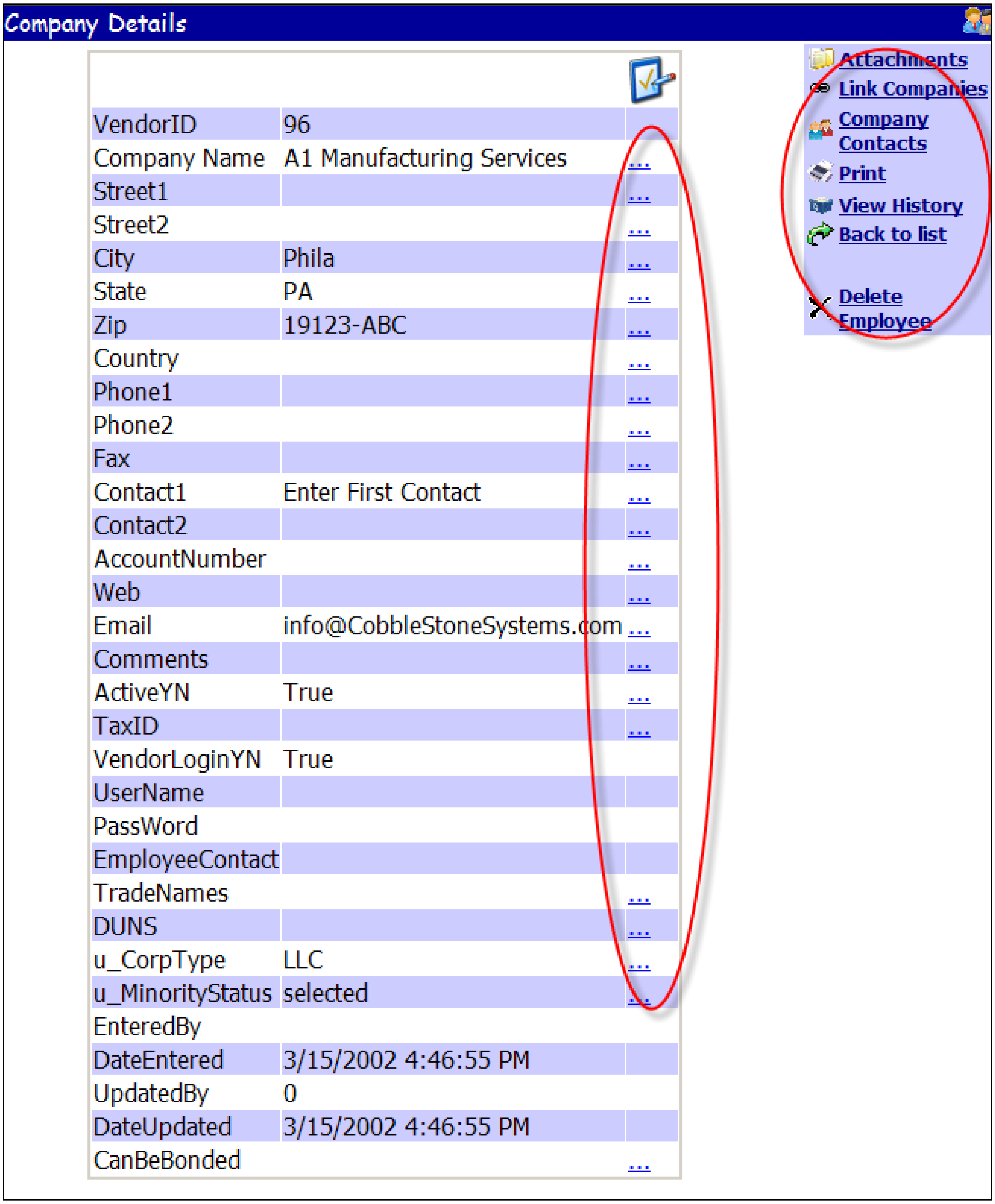
Company Contacts (Add Contact)				
Last Name	First Name	E-Mail	Phone	
Jones	Mike	info@mikejones123x.com	444-333-4444	...
terst	Tina s	test@test.com		...

View and Edit Companies (Vendors/Customers)

To view or edit Vendor and Customer information select “Company List” from the “Companies” Menu. Each Vendor and Customer entered in the system will be displayed as follows.

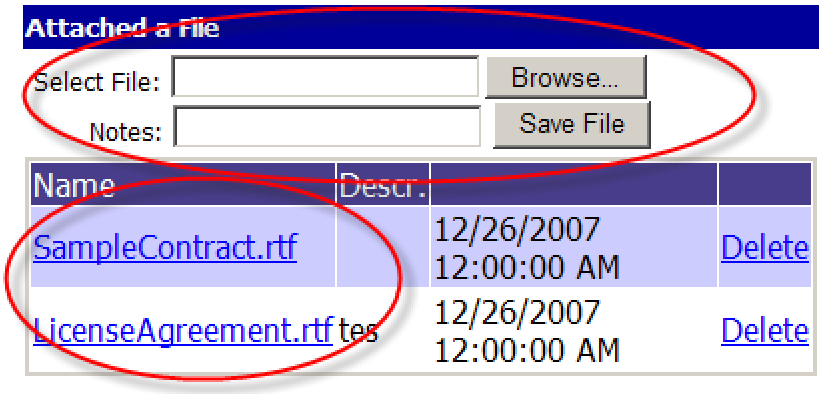


Upon selecting ‘view’ for a name from the list, the details form will appear.



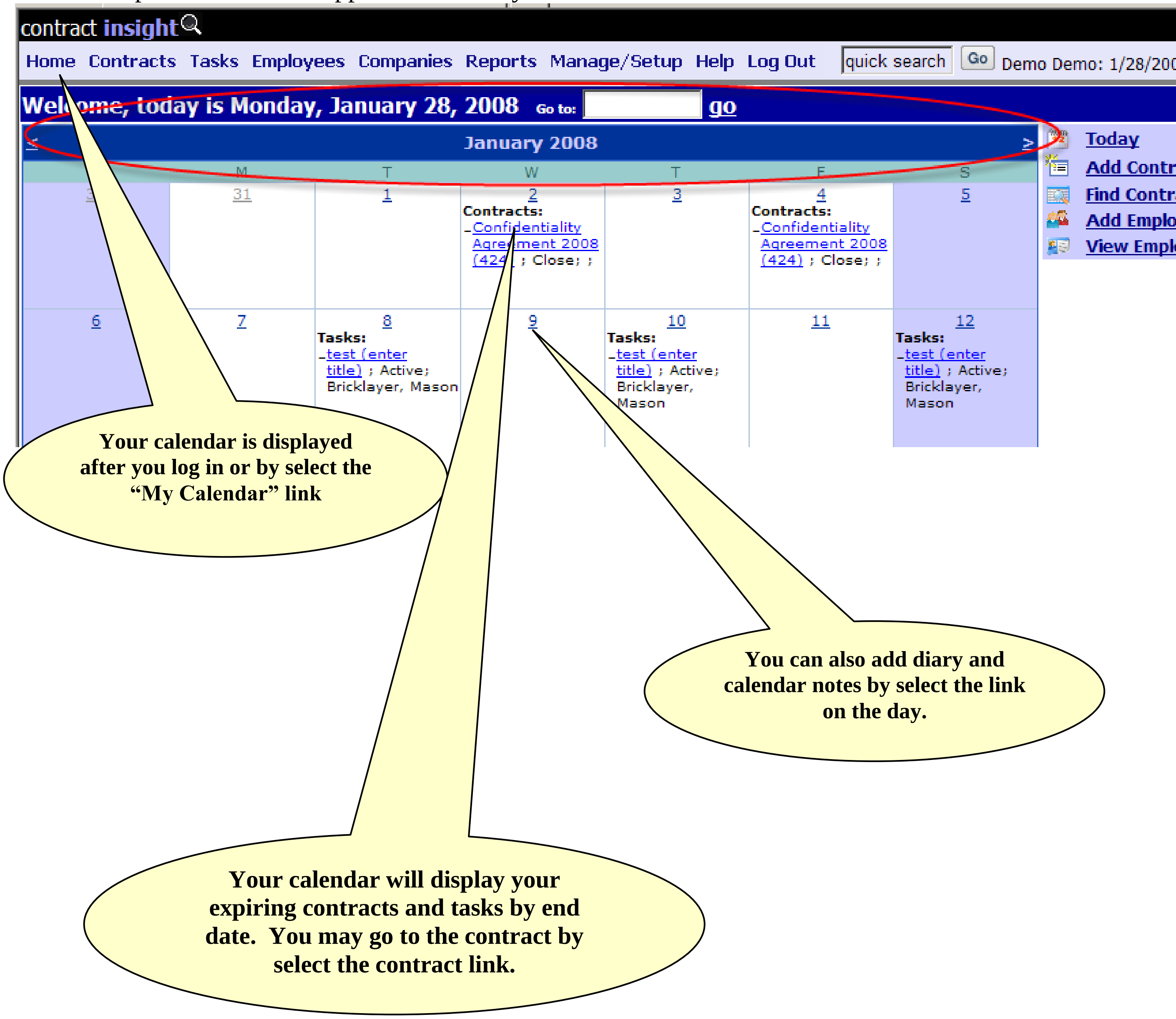
To link companies together, select the ‘Link Companies’ item.

To add attachments to a company: select the ‘Attachments’ item. Next, ‘Browse’ to the file you want to attach and select ‘Save’.


Attached a File
Select File:
Browse...
Notes:
Save File
Name
Descr.
SampleContract.rtf
12/26/2007 12:00:00 AM
Delete
LicenseAgreement.rtf
tes
12/26/2007 12:00:00 AM
Delete

My Diary and Calendaring

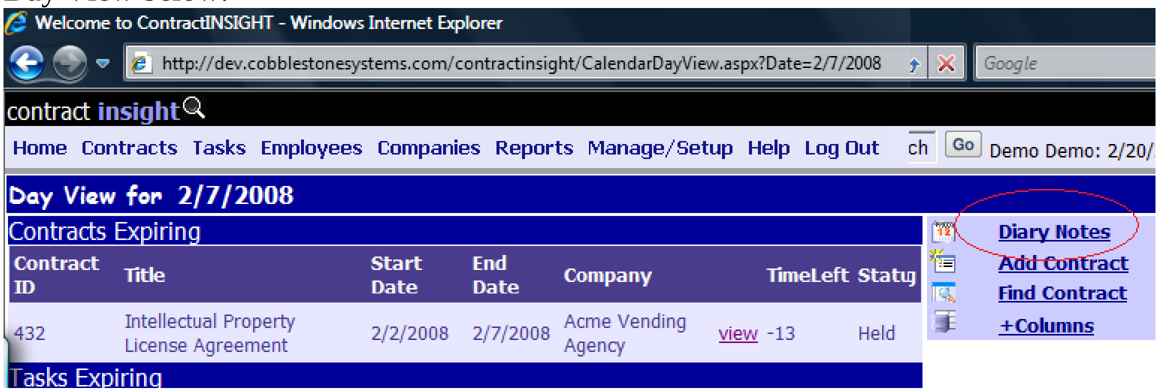
Contract Insight includes a web-based calendar and notes diary features. The calendar displays expiring contracts and contract tasks based on end-dates. The calendar can be used to keep notes and track appointments for your users.



To navigate to various months you can use the arrow “>” buttons at the top of the calendar or enter a date in the date input field at the top.

To add notes or view the “day view” of the calendar, select the number of the day for a particular day on the calendar. The Day view will appear as seen below. You may view the day view and enter notes on the day view.

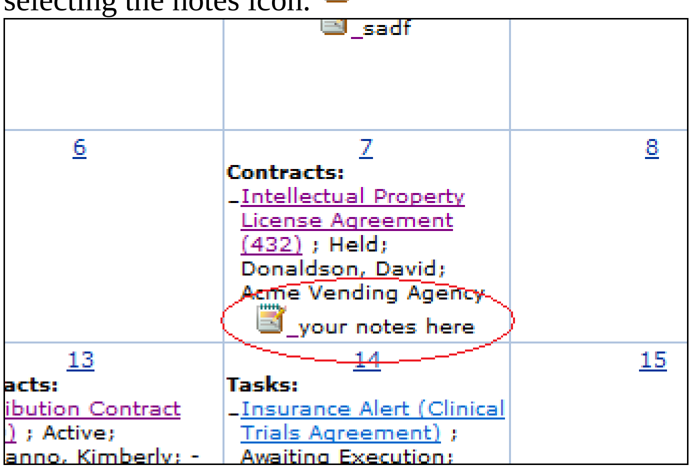
Day View below:



Diary Notes

To add a diary note, select the day view and select the Diary Notes link (see above)

To save your diary notes, select the save link button. The notes will be saved and displayed on the calendar as seen below. You may edit your notes from the Calendar by selecting the notes icon.



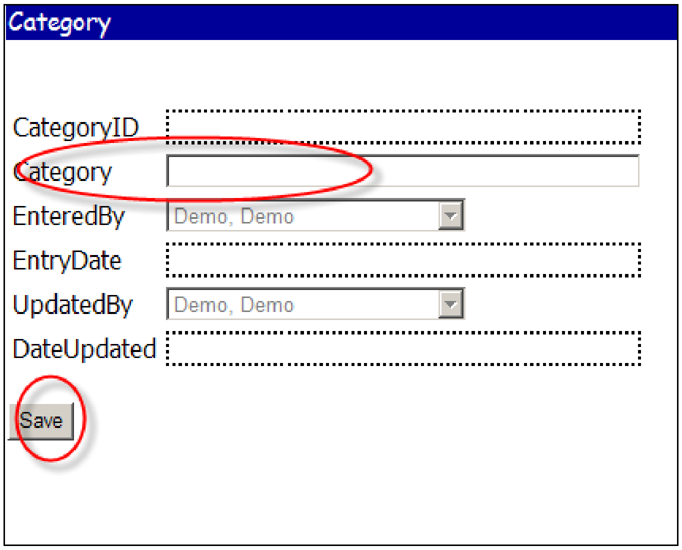
Contract Management - Setup

It is recommended that the Contract Categories, Departments, Locations, Contract Types, Status, and Occurrence should be entered in by the system Administrator before entering in contract data.

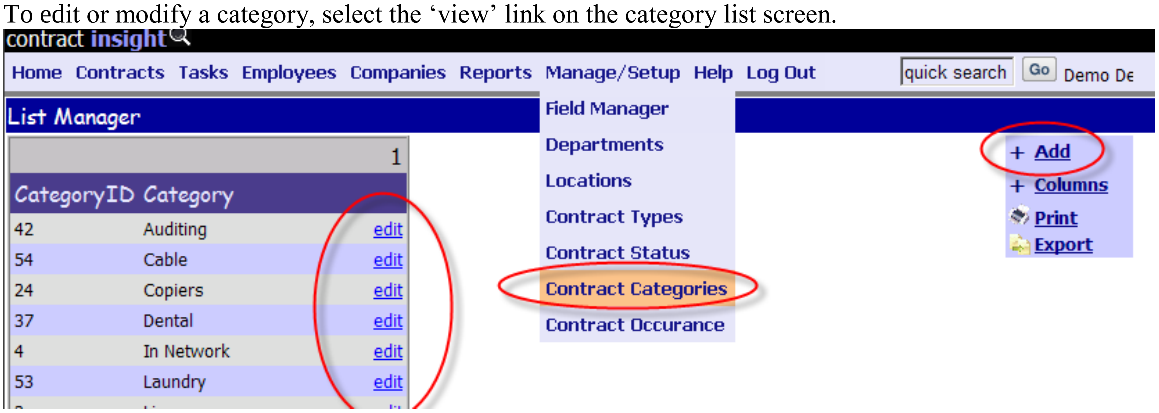
Contract Categories

Contract Categories are used to classify contracts into categories for classifications purposes. For example, a hospital may classify contracts into “in-network” or “out-of-network” categories.

To enter or manage Contract Categories select “Contract Categories” from the “Manage/Setup” menu option (this menu item is available to admin users). Select the “Add” menu item and enter the category name. Select “Save” to save the information entered.



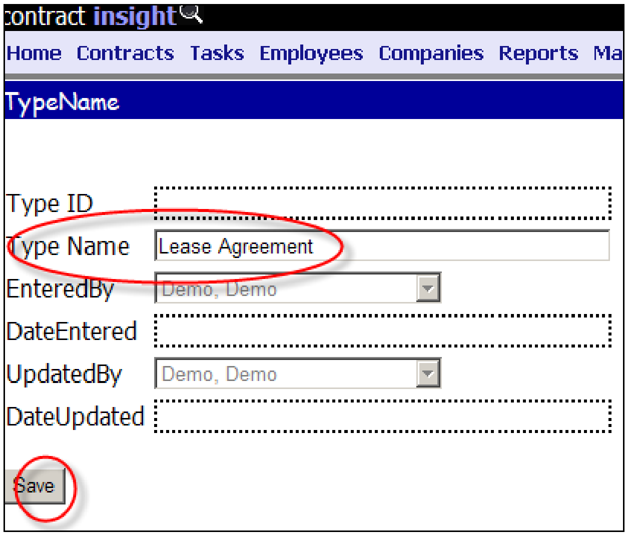
To edit or modify a category, select the 'view' link on the category list screen.



Contract Types:

Contract Types are used to classify contracts into Type for tracking and contract creation purposes. For example, types of contracts may be "Contractor Agreement", "Confidentiality Agreement", "Software Agreement", and/or "Lease Agreement".

To enter or manage Contract Types select "Contract Types" from the "Contracts" menu option. Select the "Add Contract Types" button and enter the Type name.



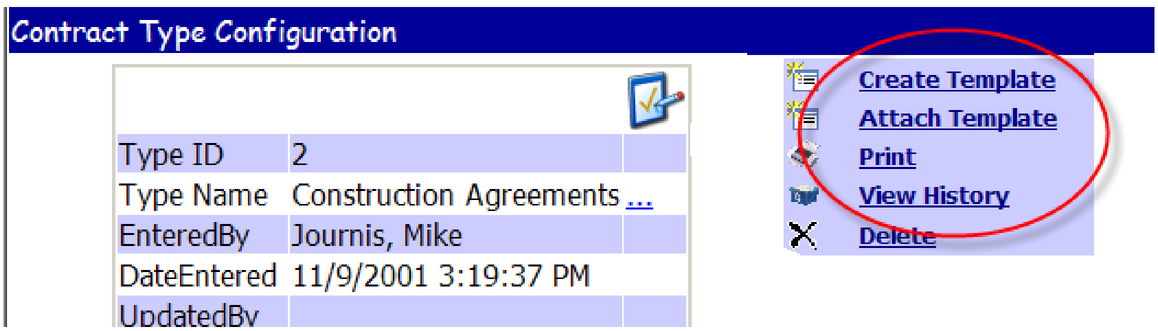
Select "Save" to save the information entered.

Contract Templates

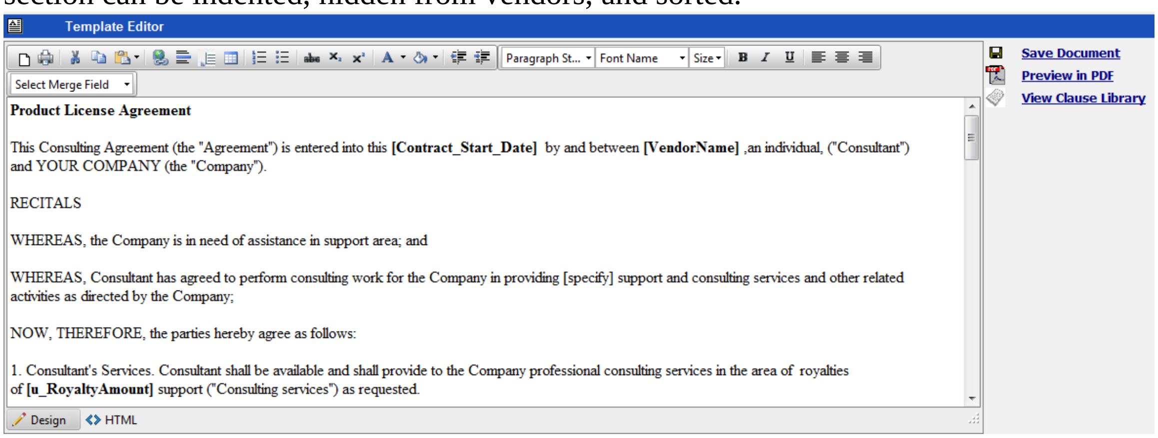
Contract Insight supports the ability to create contract templates and apply (inherent) the templates to contracts when they are entered to streamline the contract creation process.

Contract Templates are linked to Contract Types. After entering Contract Types, you can add templates that will be associated with each Contract Type. For example, Confidentiality “Type” may have a template created and linked to it.

To add Template (in sections), view an existing “contract type”, next, select “Create Template” from the Contract Type details form.



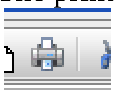
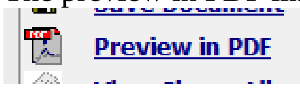
Upon selecting “Create Template” you will be prompted to enter in the Template text. For example, a template section may be the “non-disclosure” section of a contract. Each section can be indented, hidden from vendors, and sorted.



Be sure to select the ‘save’ link to save the document.

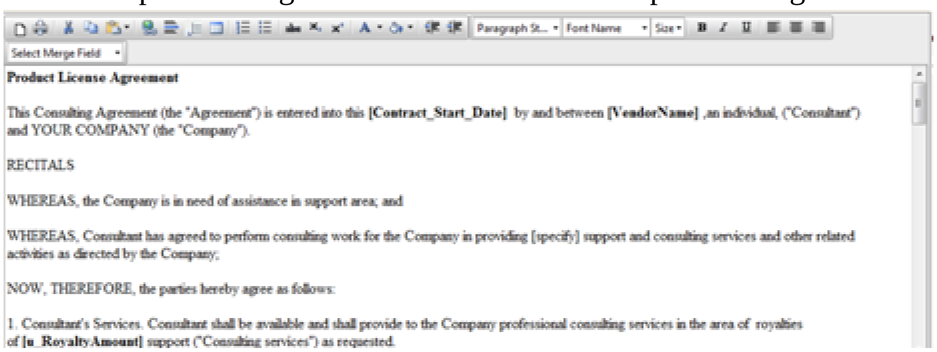
Optionally, in end-user mode, the system supports a watermark/background.

Template Preview
After entering each section of a contract template you can view the template by selecting one of the following:

1. The print icon:

2. The preview in PDF link:


Templates - Global Header and Footers

Contract Insight Enterprise Template Manager enables admin users to create a global (system) header and footer. To assign a global header and footer, select the 'Maintenance' menu under the Manage/Setup main menu item. Next, select the Header or Footer template manager. The Header / Footer template manager screen will appear.



Select Save to save the header/footer.

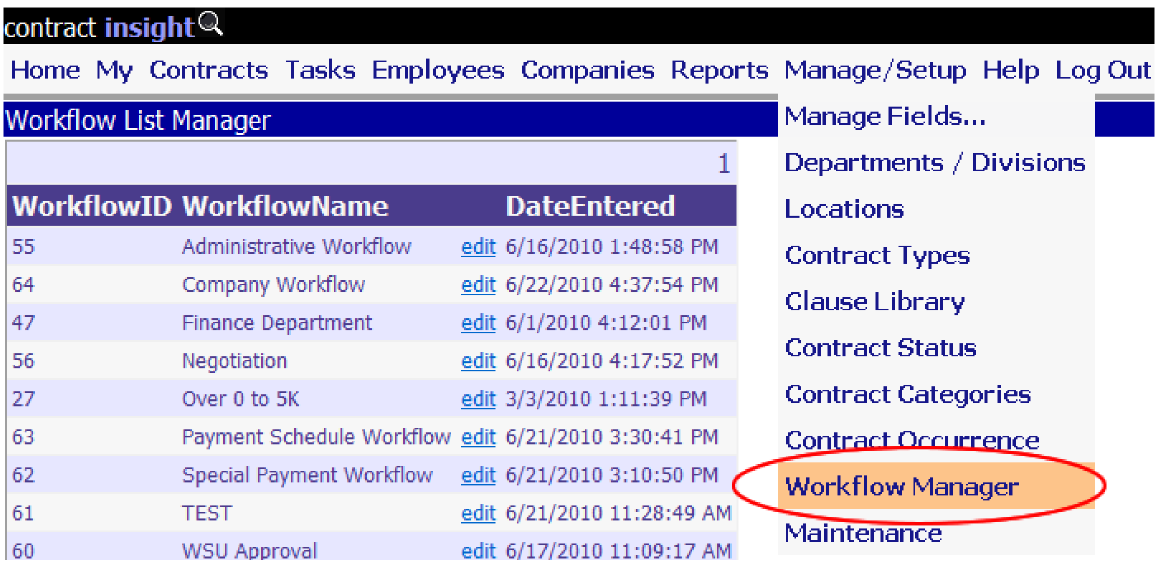
Workflow and Pre-Defined Tasks

Setting Pre-Defined Workflow Tasks based on a Contract Fields

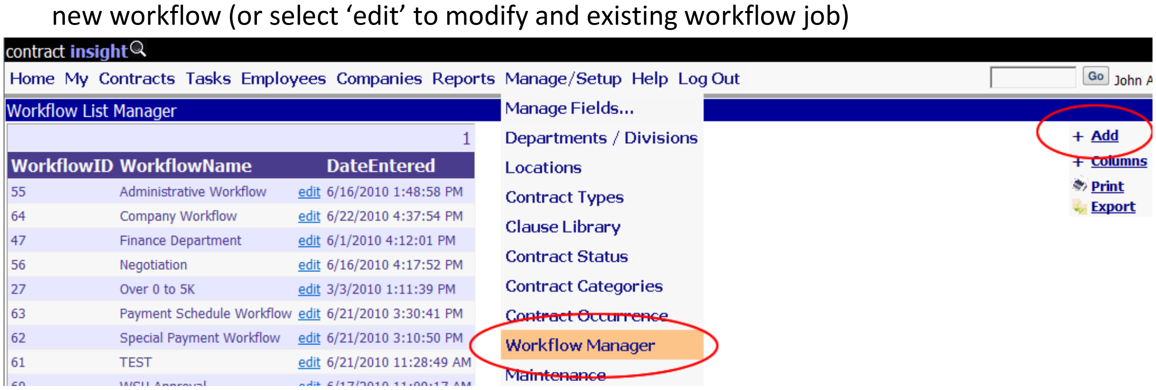
Contract Insight includes the feature that allows for creating and defining user-configurable and flexible workflow tasks. The pre-definable workflow tasks are configured based on any contract field value or combination of contract field value. For example, administrator users can create one or multiple workflow tasks to be used for approvals, alerting, and reminders based on Contract field values. This is beneficial to help organization standard workflow tasks (individual tasks can be assigned on the contract screen as well). Pre-defined workflow tasks will automatically create automated tasks (calendar and e-mail alerts). This means that any time a new contract is entered into the system for a particular Contract, automated tasks can be auto populated on the Contract record by the system. Tasks can be assigned to a person, a group, have start dates, end dates, notify days, repeat on an interval (weekly, monthly, quarterly and annual for recurring alerts), and escalate to another employee if needed.

To set up Pre-defined Workflow Tasks (e-mail and calendar alerts) based on a Contract Fields:

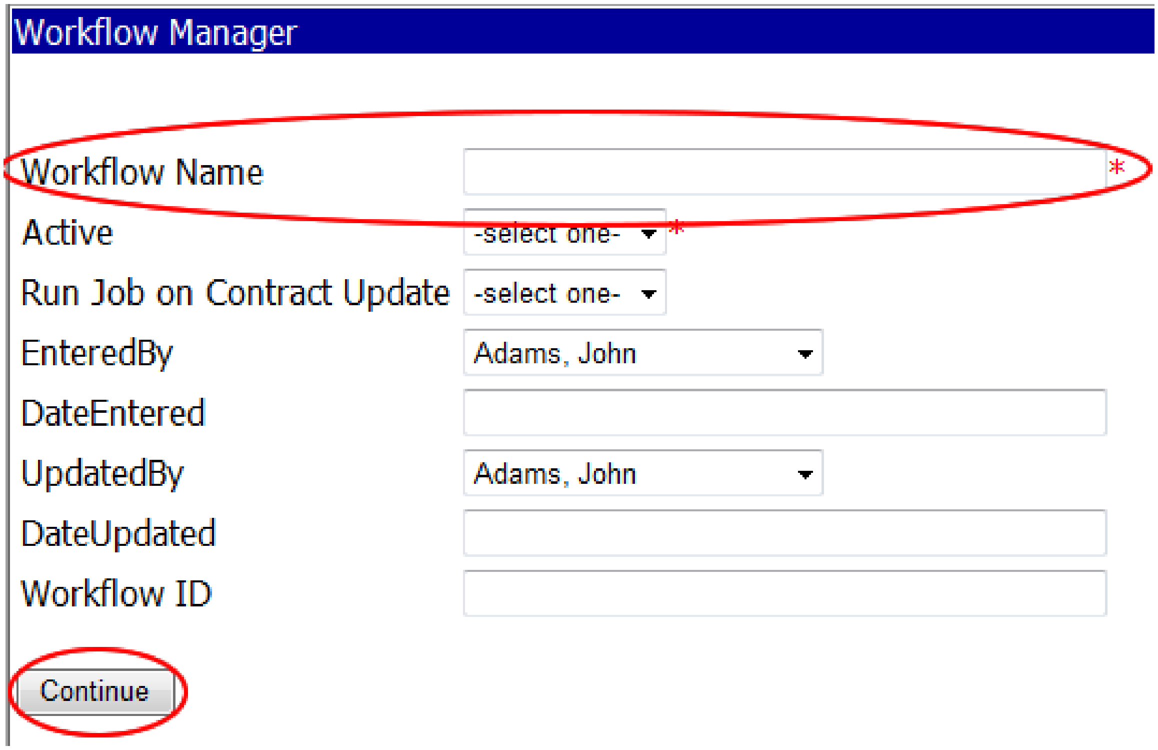
1. Log into the system as an administrator user
2. Select 'Workflow Manager' from the 'Manage/Setup' menu



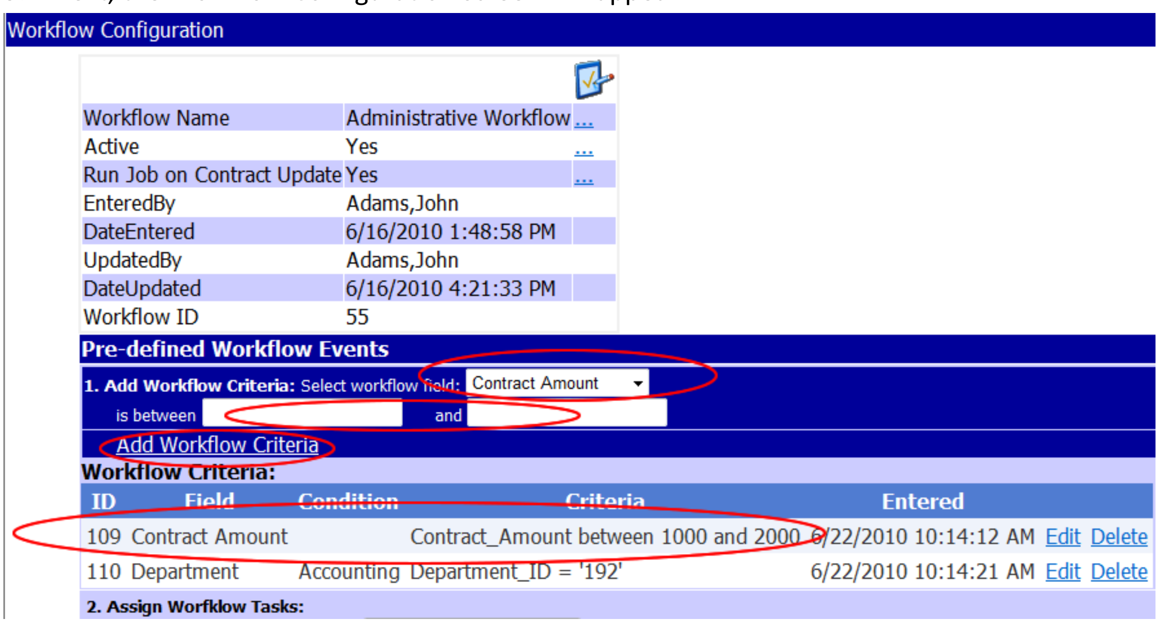
3. The Workflow Manager list will appear, next, select 'Add' on the right menu to define a new workflow (or select 'edit' to modify and existing workflow job)



4. Next, the Workflow Manager screen will appear, enter a workflow (job) name (title), if it is active or not, and if the workflow (job) should be run on the update of a contract (as well as on creation). Once done, select Continue (seen below)

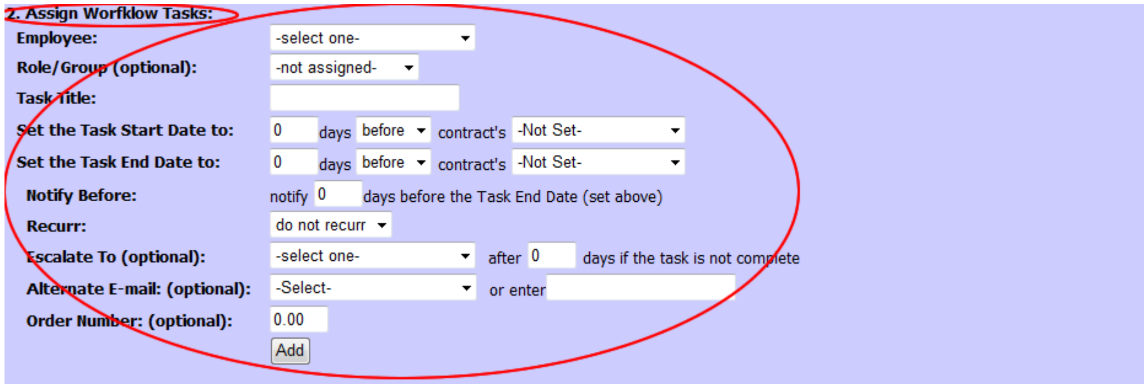


5. Next, the Workflow Configuration screen will appear



6. Next select the contract field that you want to trigger workflow based on (see above; the example above is setting a contract task based on the contract's Contract Amount field, when the contract amount field is between $0 and $999 a task will be assigned); be sure to select the 'Add Workflow Criteria' link to save the workflow criteria. You may add additional/multiple workflow criteria for each workflow job. Existing workflow criteria will show in the Workflow Criteria section (seen above).
7. Next, enter each workflow task that you want assigned on a contract when the criteria (set above) is entered. First, select the Employee name from the Employee list (or select

'employee' on the list to default to the Employee that the contract is assigned to). Optionally, assign a role / group of people. Next, enter the Task Title.



The following tasks will be present when a contract is set to the criteria above (when the contract is created):

Task Name	Assigned To	Role Name	Add Start Days	Start Date Field	Add End Days	End Date Field	Notify Days	Recurr	Escalate To	Escalate (days)	Alternate E-mail		Order
Administration Review	John Adams		-30	Expiration Date	-5	Expiration Date	35	0	Carter, Jimmy	0		Delete	0.00

8. Enter the days before or after that you want the email sent on. It is recommend to set the 'Days +/- Expiration Date' (as seen above) for this is when the e-mail and alert is sent . Enter in a positive value (such as a 1) if you want the alert sent after the Entry Date of the contract or another date on the contract page; enter a negative value if you want the alert sent before a date on the contract screen (for example, enter a -60 from the 'Expiration Date' if you want an alert sent 60 days before the Expiration (end date) of the contract).
9. To have a task notify the user before the task end date, set the days in the Notify Days field.
10. Optionally, to have the task repeat on a interval (such as weekly, monthly, quarterly, or yearly), select the Recurr value. The task will repeat up until the end date (expiration date) of the contract.
11. Optionally, to have the task escalate if the primary employee (that the task is assigned to) does not mark (update) the task as complete, select the Escalate To and Escalate After days.
12. Optionally, to specify additional e-mail address for this task to be e-mailed to, specify them in them either from the list of users in the system or type your own in (separate each e-mail by a comma ','
13. Optionally, provide an Order Number to specify the ordering sequence of the tasks associated with this workflow (job). Order Number allows you to order your tasks on a contract in your own sequence.
14. Next, select the 'Add' button to save the pre-defined task.
15. Repeat the steps to add as many alerts for each Workflow Job.

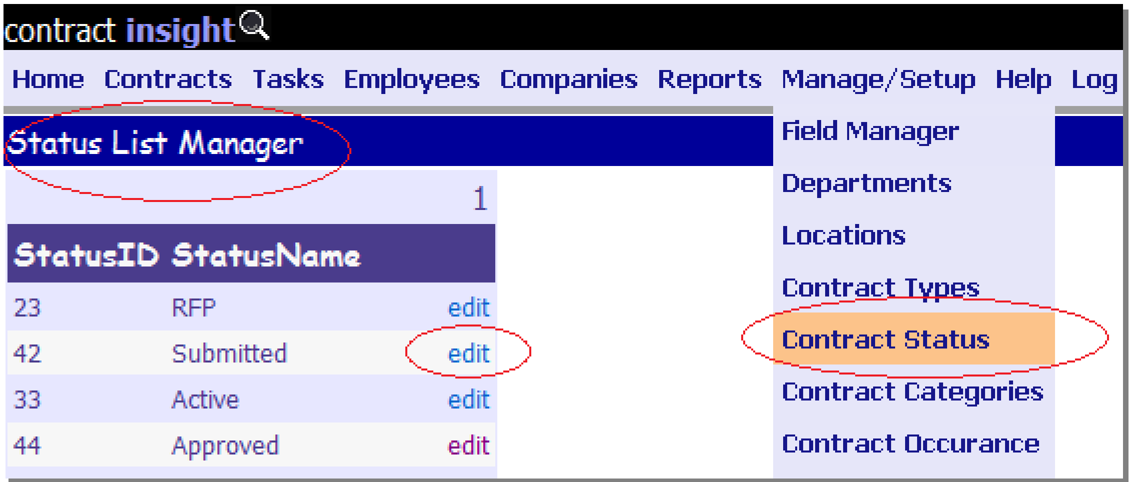
    NOTE: The system allows an administrator user to define unlimited workflow flow combinations based on many contract fields—this allows for a great deal of flexibility and complex combinations to meet your organization goals for workflow tasks and alerts.

Setting Pre-Defined Workflow Tasks based on a Contract Status

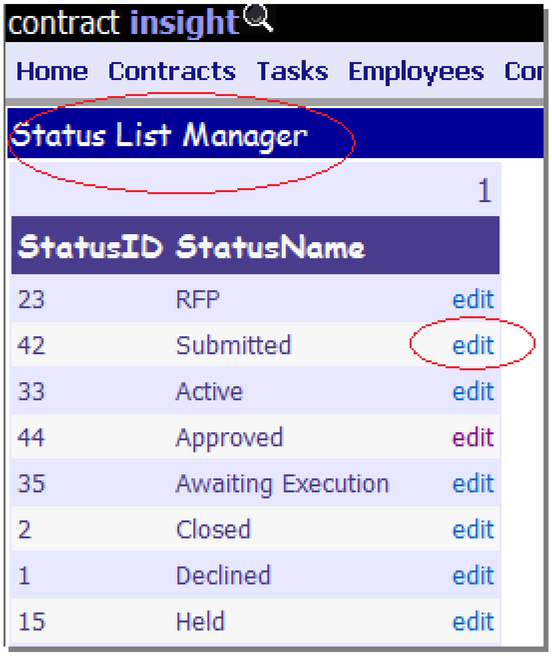
The system can automatically create automated tasks (calendar and e-mail alerts) based on a Contract Status. This means that any time a new contract is entered into the system for a particular Contract Status, automated tasks can be set by the system. The system will add additional tasks to a specified contract as the Contract Status is changed.

To set up Pre-defined Tasks (e-mail and calendar alerts) based on a Contract Status:

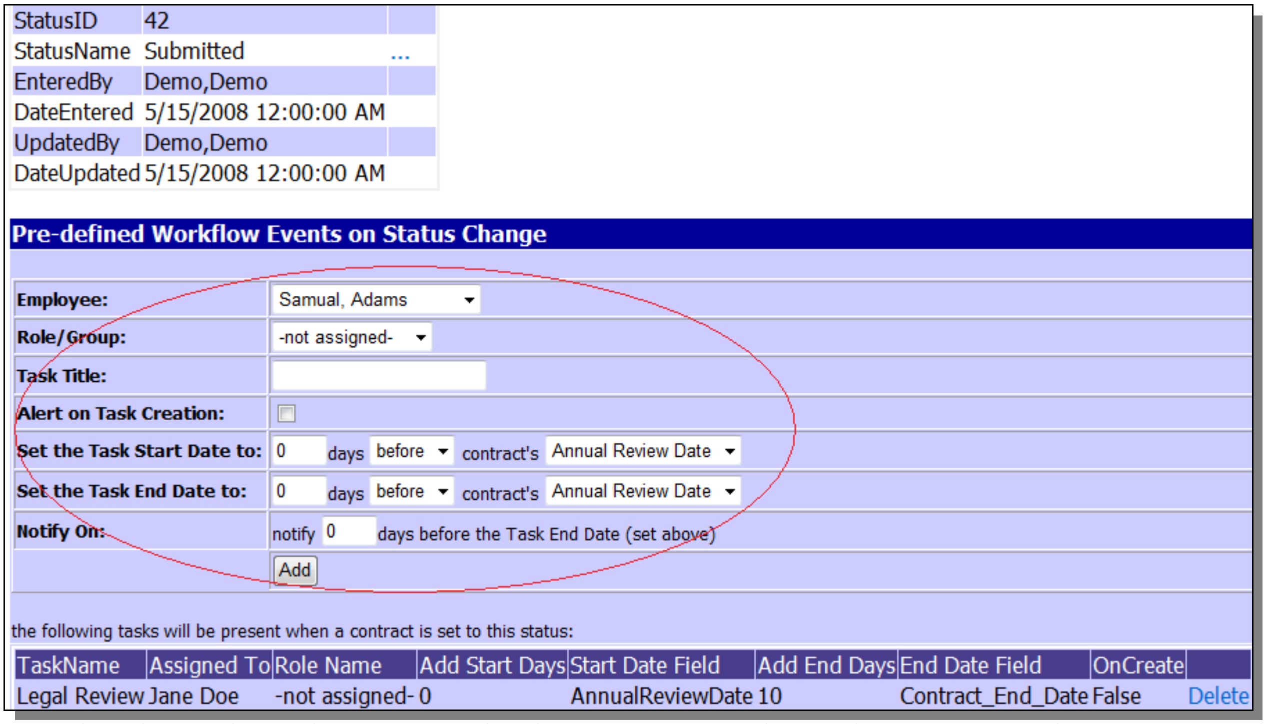
16. Log into the system as an administrator user
17. Select 'Contract Status from the 'Manage/Setup' menu



18. The Contract Status list will appear, next, select 'edit' (view) for the Contract Status you want to set pre-defined tasks for



19. Next, the Contract Status details screen will appear, scroll down and add your pre-defined tasks (seen below)



20. Select the Employee that you want the alert assigned to in the Employee dropdown box (as seen above).
21. Enter the Workflow title (this will become the task name) (see above)
22. Enter the days before or after that you want the email sent on. It is recommend to set the ‘Days +/- Expiration Date’ (as seen above) for this is when the e-mail and alert is sent . Enter in a positive value (such as a 1) if you want the alert sent after the EntryDate of the contract or another date on the contract page; enter a negative value if you want the alert sent before an date on the contract screen (for example, enter a -60 from the ‘Expiration Date’ if you want an alert sent 60 days before the Expiration (end date) of the contract).
23. To have a task notify the user before the task end date, set the days in the Notify Days field.
24. Select the ‘Add’ button to save the pre-defined task.
25. Repeat the steps to add as many alerts for each Contract Status.
    NOTE: The example above will create an automatic task set to the AnnualReviewDate of each contract (for contracts that have the Submitted Contract Status selected when the contract is added). The task will be assigned to Adriano Batar (for this example). As the specific Contract Status is changed, the pre-defined tasks will be added to the specific contract record. You may alter the actual Task End Date and Notify Days to meet the specific contract needs.

Setting Pre-Defined Workflow Tasks based on a Contract Type

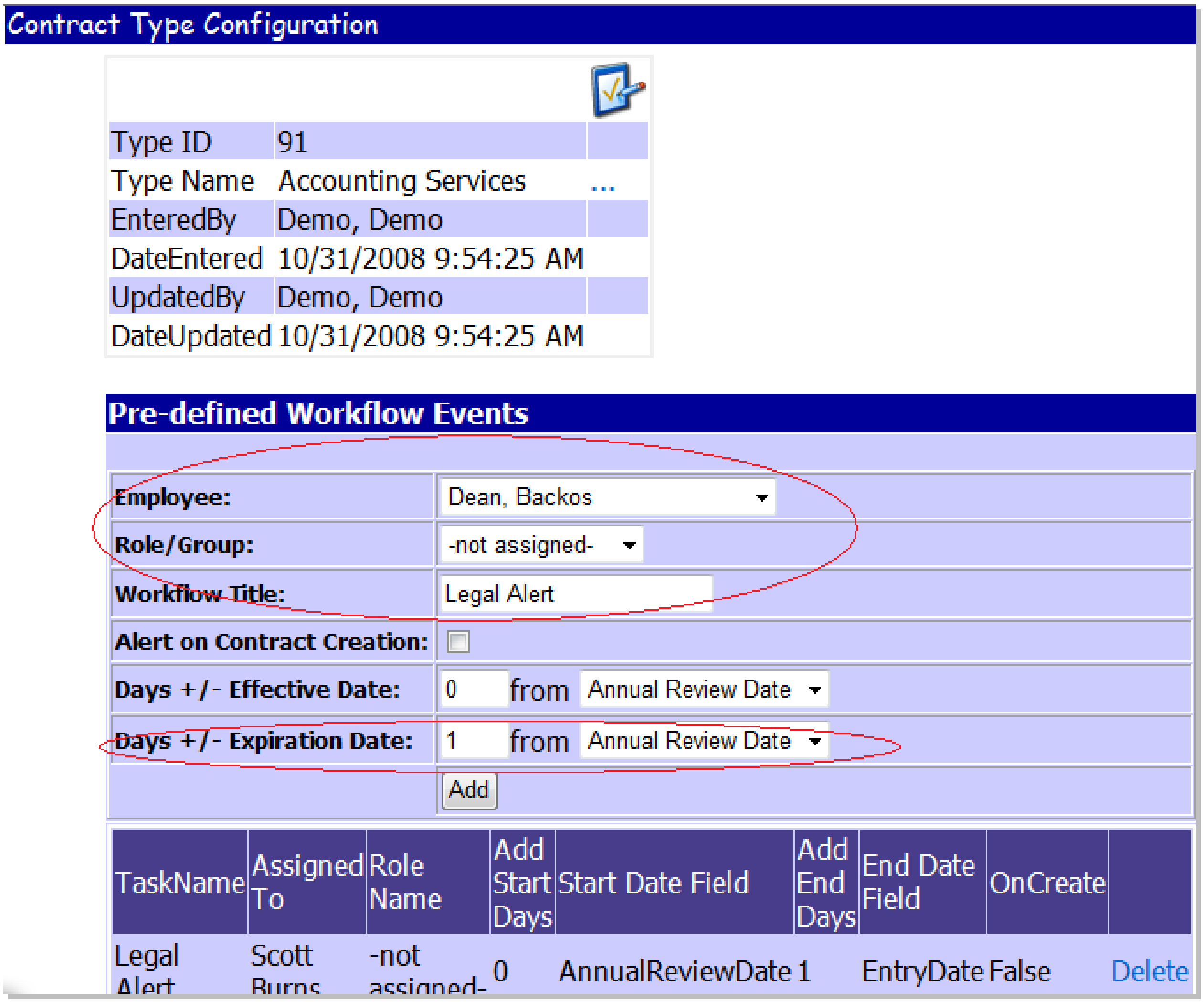
The system can automatically create automated tasks (calendar and e-mail alerts) based on a Contract Type. This means that any time a new contract is entered into the system for a particular Contract Type, automated tasks can be set by the system.

To set up Pre-defined Tasks (e-mail and calendar alerts) based on a Contract Type:

26. Log into the system as an administrator user
27. Select 'Contract Type' from the 'Manage/Setup' menu

28. The Contract Type list will appear, next, select 'view' for the Contract Type you want to set pre-defined tasks for

29. Next, the Contract Type details screen will appear, scroll down and add your pre-defined tasks (seen below)



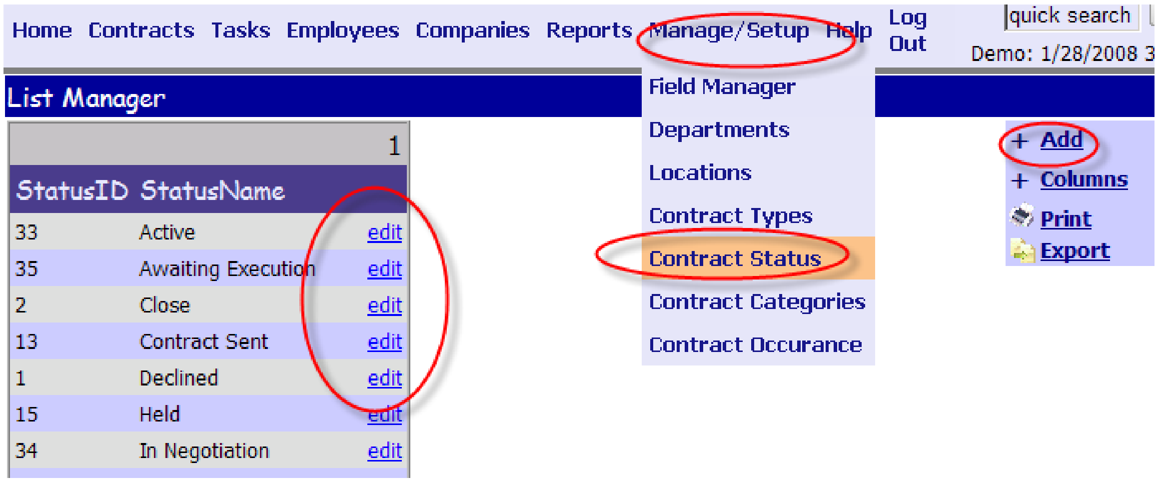
30. Select the Employee that you want the alert assigned to in the Employee dropdown box (as seen above).
31. Enter the Workflow title (this will become the task name) (see above)
32. Enter the days before or after that you want the email sent on. It is recommend to set the 'Days +/- Expiration Date' (as seen above) for this is when the e-mail and alert is sent. Enter in a positive value (such as a 1) if you want the alert sent after the Entry Date of the contract or another date on the contract page; enter a negative value if you want the alert sent before a date on the contract screen (for example, enter a -60 from the 'Expiration Date' if you want an alert sent 60 days before the Expiration (end date) of the contract).
33. Select the 'Add' button to save the pre-defined task.
34. Repeat the steps to add as many alerts for each contract type.

    NOTE: The example above will create an automatic task set to one day after the Entry Date of each contract (for contracts that have the Accounting Services type select when the contract is added). The task will be assigned to Dean Backos.

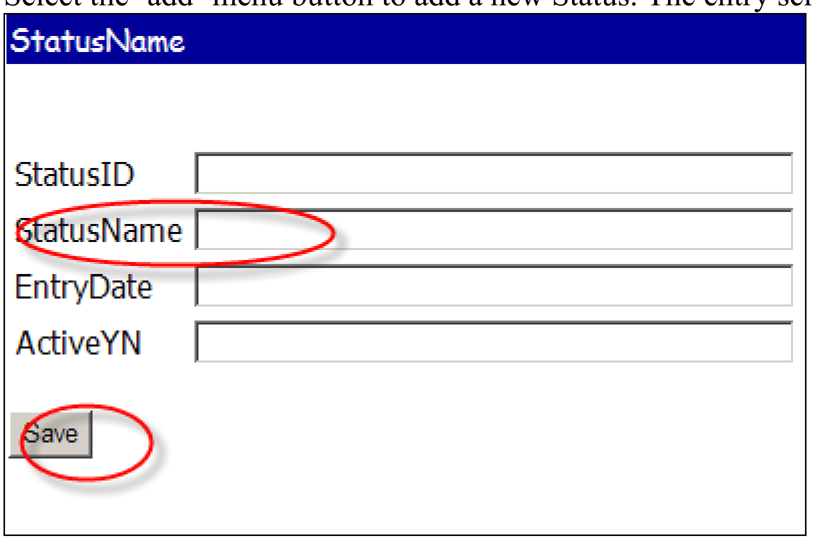
Contract Status

Contract Insight supports the ability to track contracts by contract status. For example, a Contract Status may be “Open”, “Closed”, “Canceled”, “Renewed”, or “Pending”. The Contract Status list can be managed by Admin users.

To add a Contract Status, select “Add Contract Status” from the Contract Status details form.



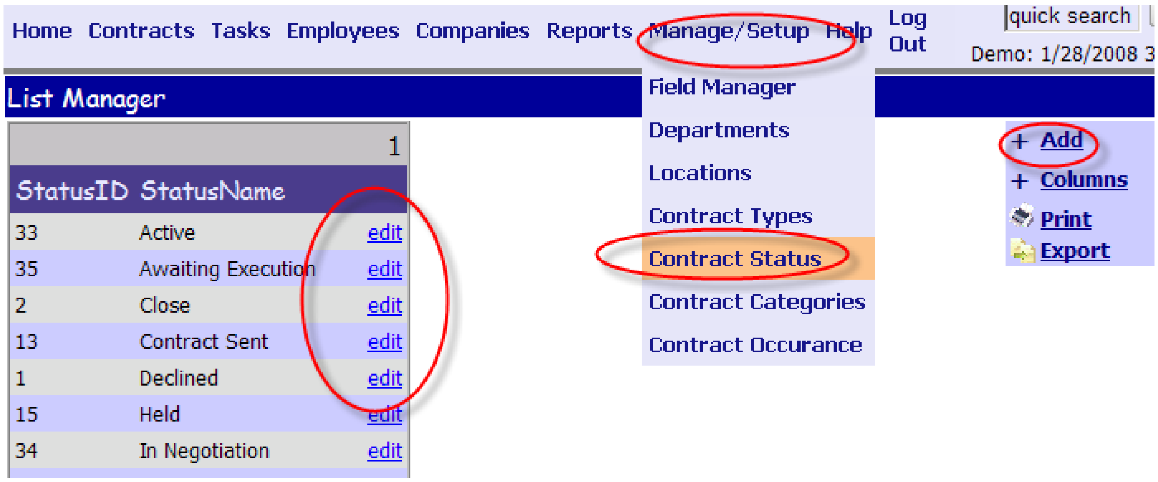
Select the ‘add’ menu button to add a new Status. The entry screen will appear:



Enter the Status Name and select Save.

View or Edit Contract Status

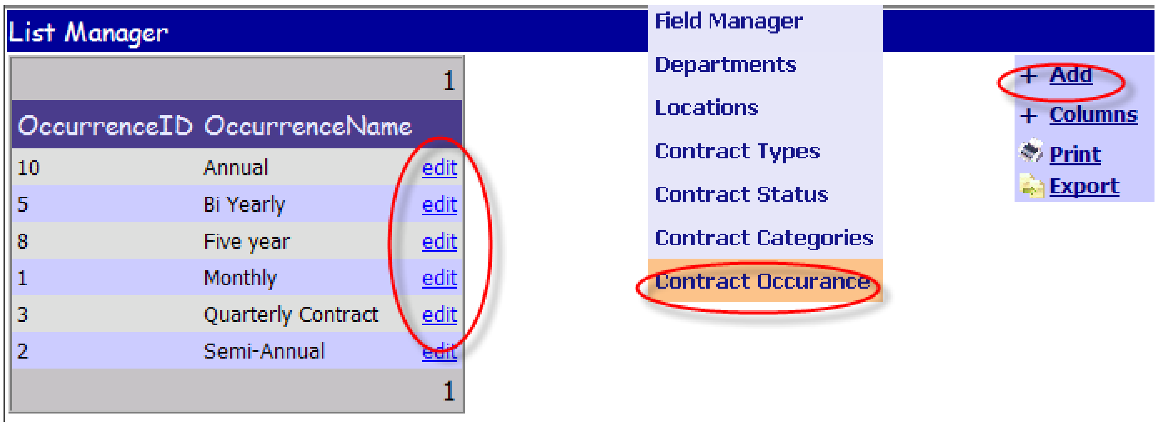
To view or edit a Contract Status select “Contract Status” from the “Manage/Setup” menu option. Select the Status name to display the Status Details form.


Home Contracts Tasks Employees Companies Reports Manage/Setup Help Log Out
quick search
Demo: 1/28/2008 3
List Manager
1
StatusID StatusName
33 Active edit
35 Awaiting Execution edit
2 Close edit
13 Contract Sent edit
1 Declined edit
15 Held edit
34 In Negotiation edit
Field Manager
Departments
Locations
Contract Types
Contract Status
Contract Categories
Contract Occurance
Add
Columns
Print
Export

Contract Occurrence

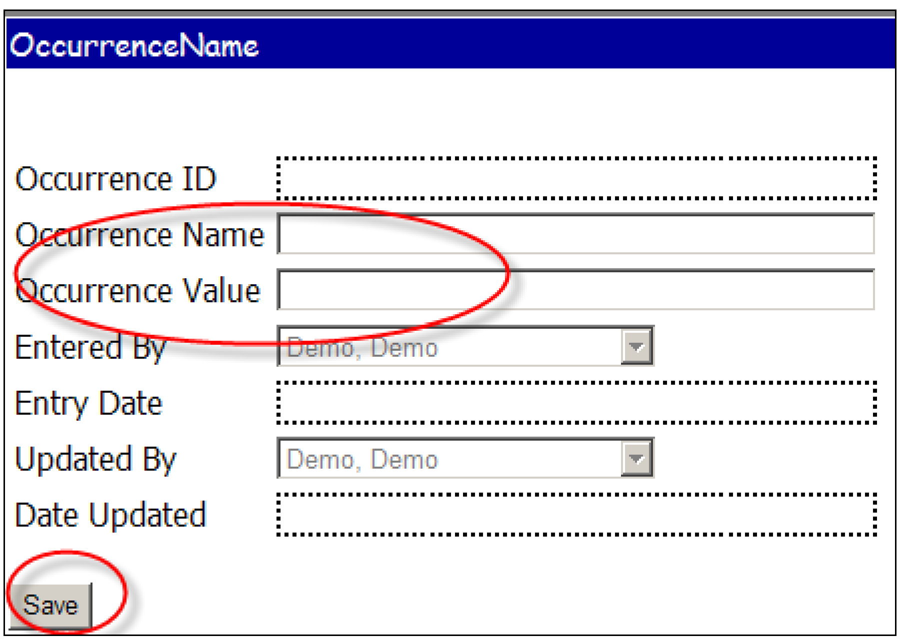
Contract Insight supports the ability to track contract occurrence and assign occurrences to contracts. For example, a Contract may occur "Monthly", "Annual", "Quarterly", etc.

To add a Contract Occurrences, select "Contract Occurrence" from the Manage/Setup menu, and select "Add".



Enter in the Occurrence Name and Occurrence Value and Select Save.

Contract Occurrence



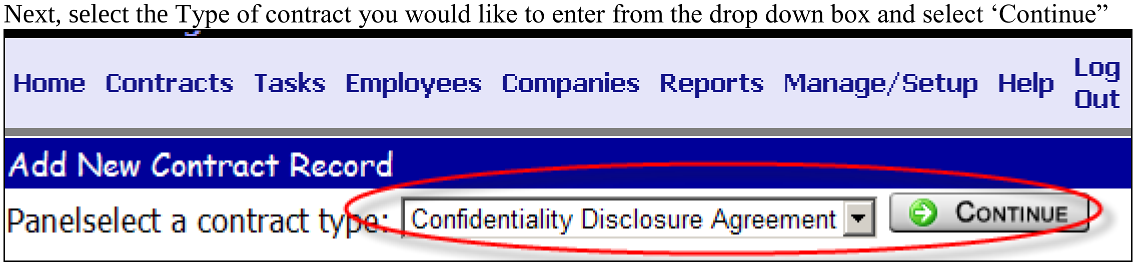
Adding a Contract

Contract Entry & Edit Form

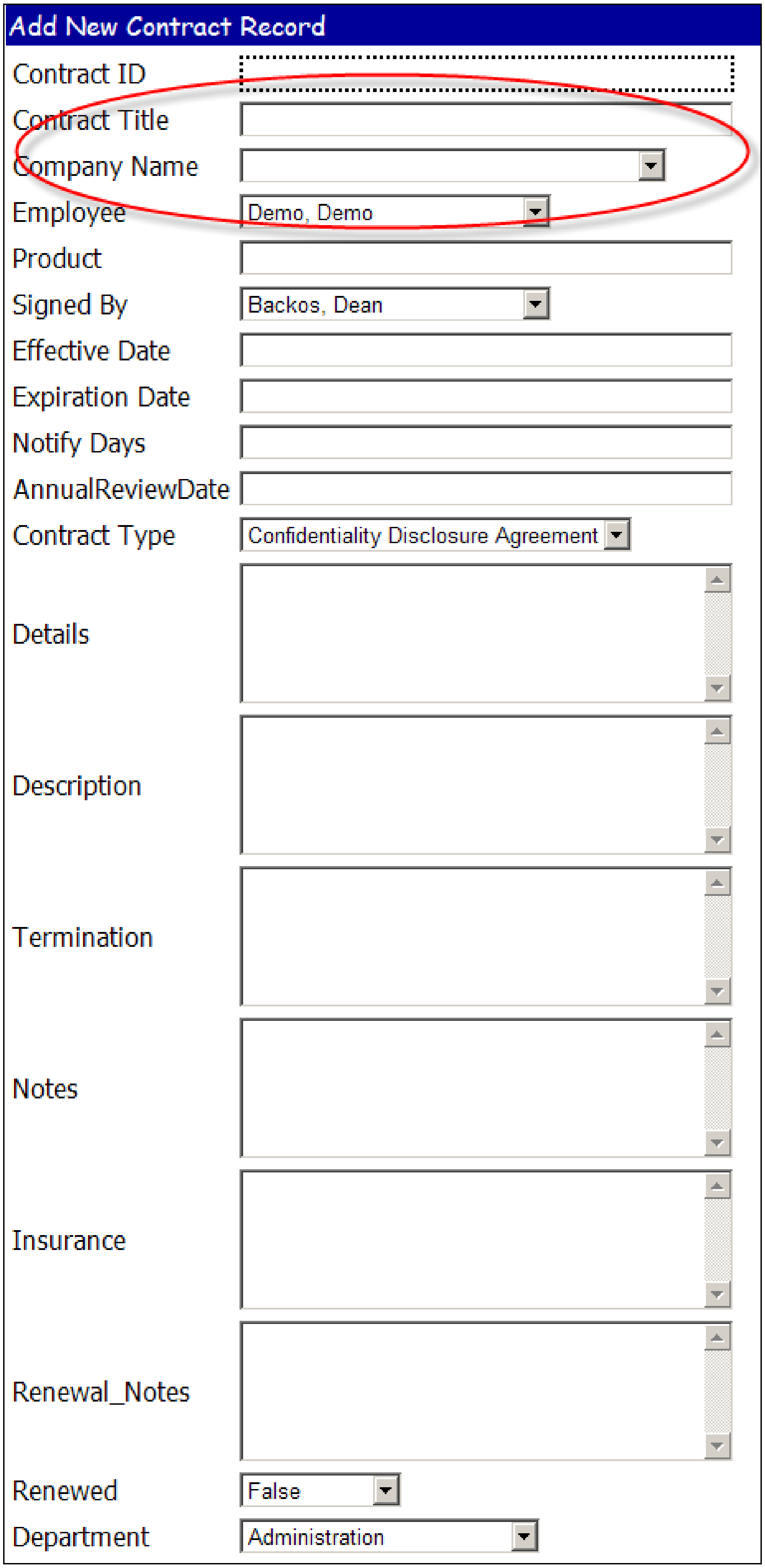
Before entering contracts into the system, be sure that the contract administrator entered all departments, vendors, employees, locations, contract types, and status information as discussed above.

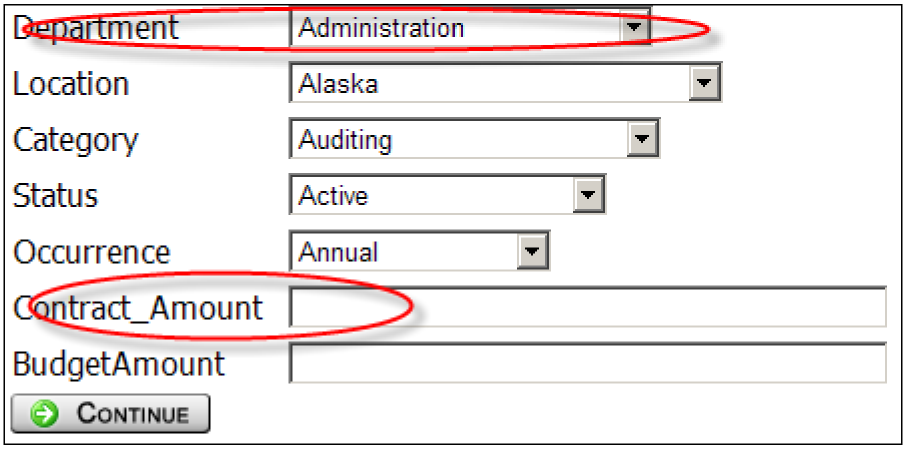
To add contracts into the system select the "Add Contract" menu from the "Contracts" menu. The contract entry form will appear.

Next, select the Type of contract you would like to enter from the drop down box and select 'Continue"



The Contract Entry screen will appear.

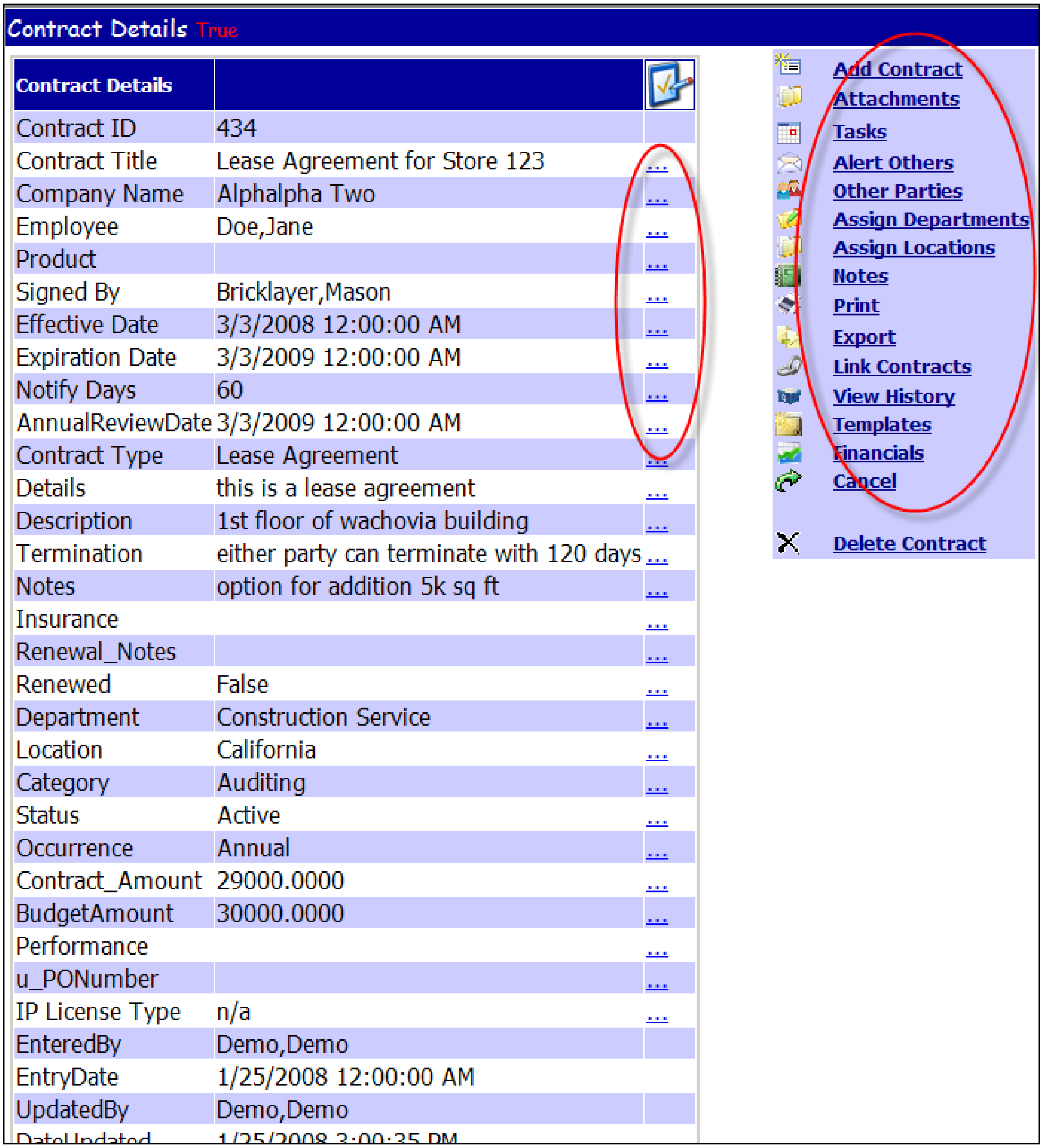

Add New Contract Record
Contract ID
Contract Title
Company Name
Employee
Demo, Demo
Product
Signed By
Backos, Dean
Effective Date
Expiration Date
Notify Days
AnnualReviewDate
Contract Type
Confidentiality Disclosure Agreement
Details
Description
Termination
Notes
Insurance
Renewal_Notes
Renewed
False
Department
Administration



Note. The contract entry and display form may vary depending on the custom fields entered by the contract administrator

- The user can enter the following information: The Contract Title, Vendor (select from list), The Product, The Contract Start and End Date (Year 2000 Compliant), Employee Contact (select from list) and Signed By information.
- The Contract Category can be used to track Contracts by specific codes.
- **Notification.** The "Notify Days" field informs the database of when to notify you when the contract is expiring based on the "Contract End Date". For example, if the contract ends on 12/1/02 and the notify days are 30 days then you will be notified the contract is expiring on 11/1/02.

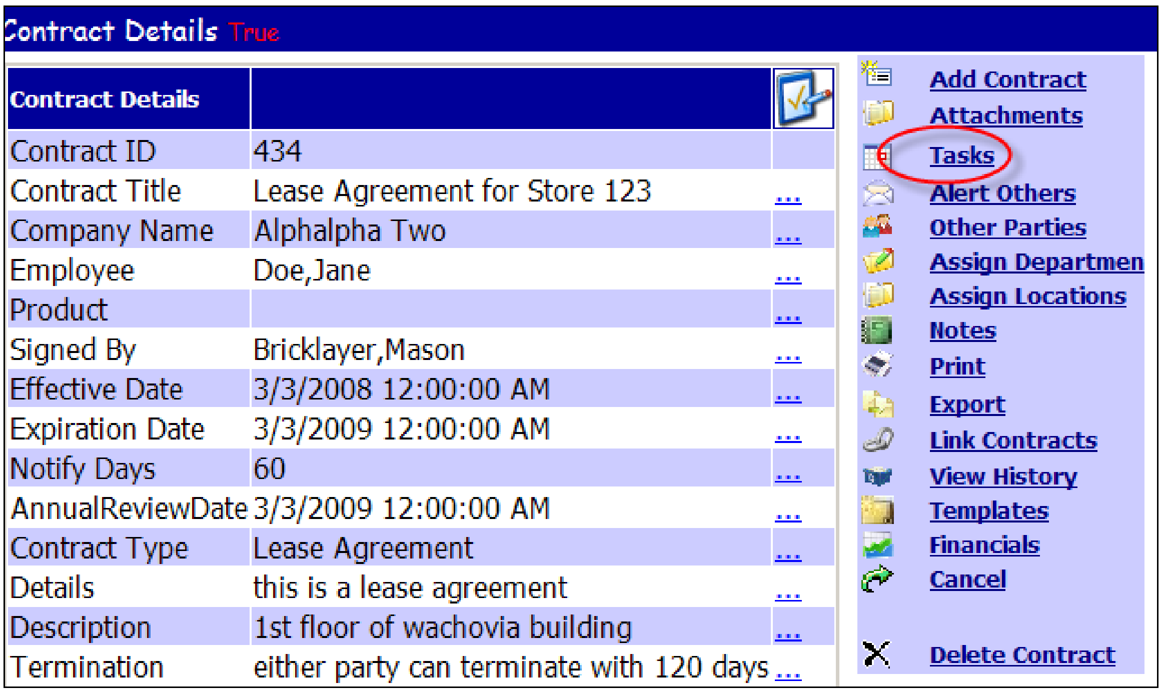
Select the 'continue' button to save your new contract record. Next, the system will show you the detailed contract record screen. On the contract details screen, you may perform various actions, such as: adding attachments, tasks/email alerts, templates, notes, print, export and more


Contract Details True
Contract Details
Contract ID 434
Contract Title Lease Agreement for Store 123
Company Name Alphalpha Two
Employee Doe,Jane
Product
Signed By Bricklayer,Mason
Effective Date 3/3/2008 12:00:00 AM
Expiration Date 3/3/2009 12:00:00 AM
Notify Days 60
AnnualReviewDate 3/3/2009 12:00:00 AM
Contract Type Lease Agreement
Details this is a lease agreement
Description 1st floor of wachovia building
Termination either party can terminate with 120 days
Notes option for addition 5k sq ft
Insurance
Renewal_Notes
Renewed False
Department Construction Service
Location California
Category Auditing
Status Active
Occurrence Annual
Contract_Amount 29000.0000
BudgetAmount 30000.0000
Performance
u_PONumber
IP License Type n/a
EnteredBy Demo,Demo
EntryDate 1/25/2008 12:00:00 AM
UpdatedBy Demo,Demo
Add Contract
Attachments
Tasks
Alert Others
Other Parties
Assign Departments
Assign Locations
Notes
Print
Export
Link Contracts
View History
Templates
Financials
Cancel
Delete Contract

Adding a Contract Sub-Tasks or Milestones

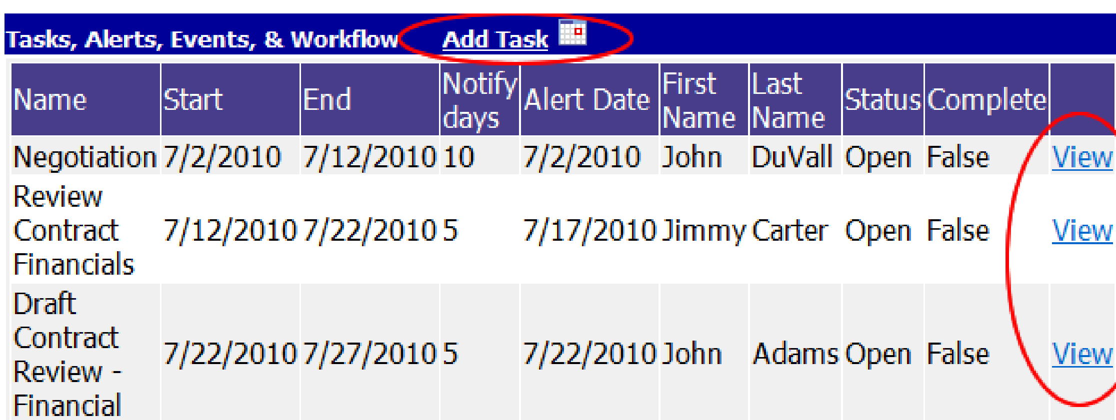
Contract Insight supports the ability to add tasks or milestones to a contract. The tasks are displayed on the calendar as an alert and can generate an email alert. This can be used to track tasks or workflow for a contract. The task will be e-mail to the employee that it is assigned to based on the notification days entered before the end date.

- To add a task, select the “Tasks” menu item,
- Next, select “Add Task” from the contract screen (as seen below).
- Add you task data such as name, dates, values, and assign it to an employee.
- You tasks will appear on the Contract Details form as seen below.



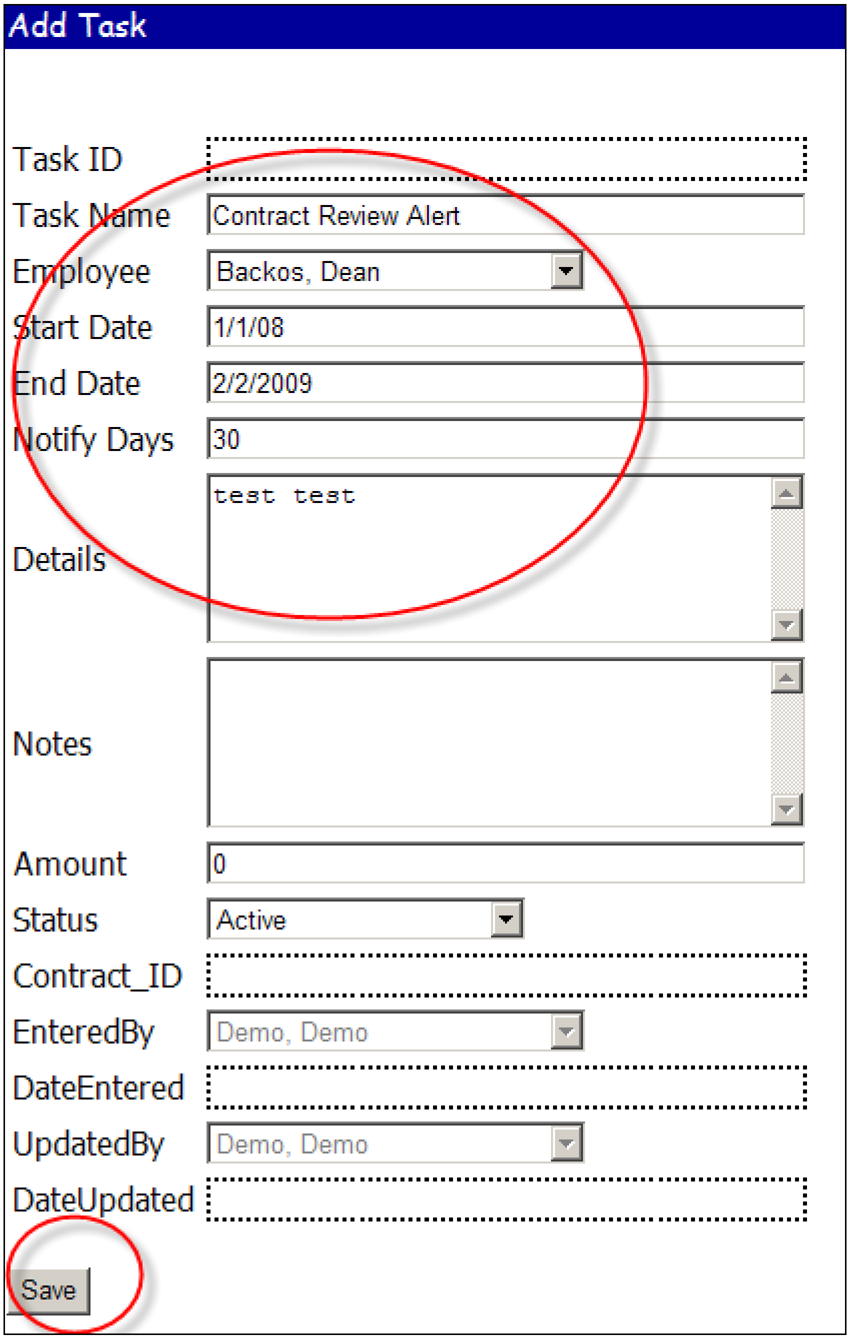
Contract Details		
Contract ID	434	
Contract Title	Lease Agreement for Store 123	...
Company Name	Alphalpha Two	...
Employee	Doe,Jane	...
Product		...
Signed By	Bricklayer,Mason	...
Effective Date	3/3/2008 12:00:00 AM	...
Expiration Date	3/3/2009 12:00:00 AM	...
Notify Days	60	...
AnnualReviewDate	3/3/2009 12:00:00 AM	...
Contract Type	Lease Agreement	...
Details	this is a lease agreement	...
Description	1st floor of wachovia building	...
Termination	either party can terminate with 120 days	...

Next, select the ‘Add Task’ link.

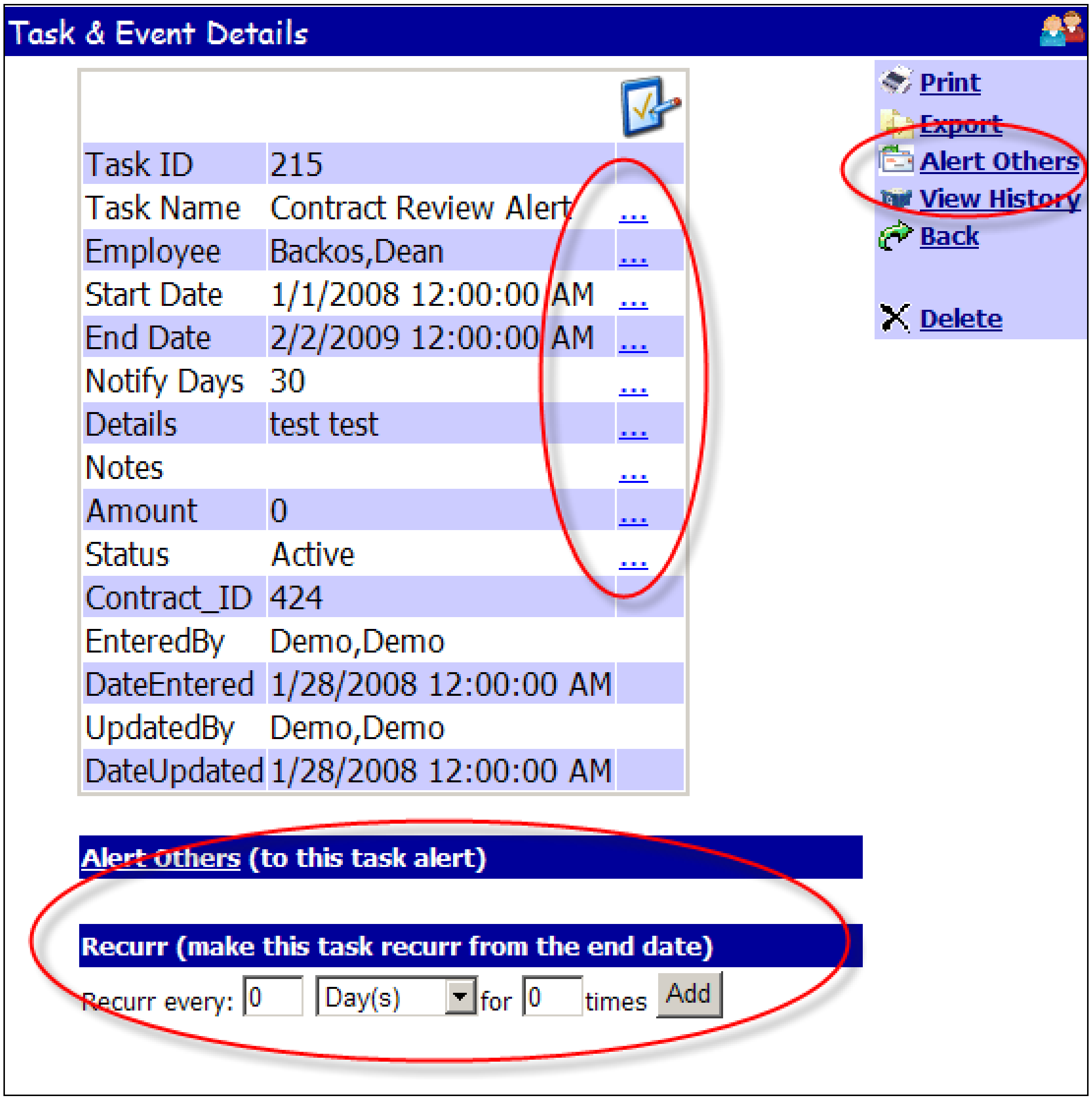


Name	Start	End	Notify days	Alert Date	First Name	Last Name	Status	Complete	
Negotiation	7/2/2010	7/12/2010	10	7/2/2010	John	DuVall	Open	False	View
Review Contract Financials	7/12/2010	7/22/2010	5	7/17/2010	Jimmy	Carter	Open	False	View
Draft Contract Review - Financial	7/22/2010	7/27/2010	5	7/22/2010	John	Adams	Open	False	View

Next, the task entry screen will appear.



Be sure to enter a task name, description, start date, end date, and notify days. The system will display the task based on the end date and notify days. Select the ‘save’ button to save. The Task Details screen will appear.



Recurring Contact Tasks

To make a Contract Task recur (recurring tasks):

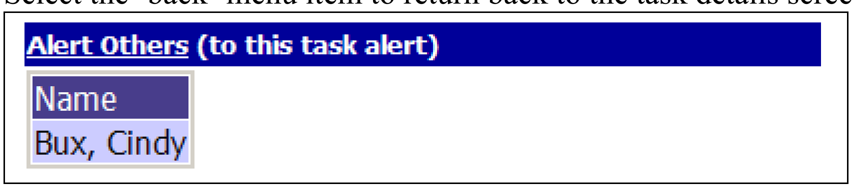
1. add a Contract Task (refer to the Contract Tasks section of this manual for more information about Tasks)
2. Change the Recur every entry box to a number (to indicate 'how often' the task should recur in the box next to the 'Recur every' text.)
3. Select the recurring interval in Months, Days, Weeks, and Years.
4. Enter the number of intervals that the task should recur.
5. Select the 'Add' button.

Contact Tasks: Alerting others

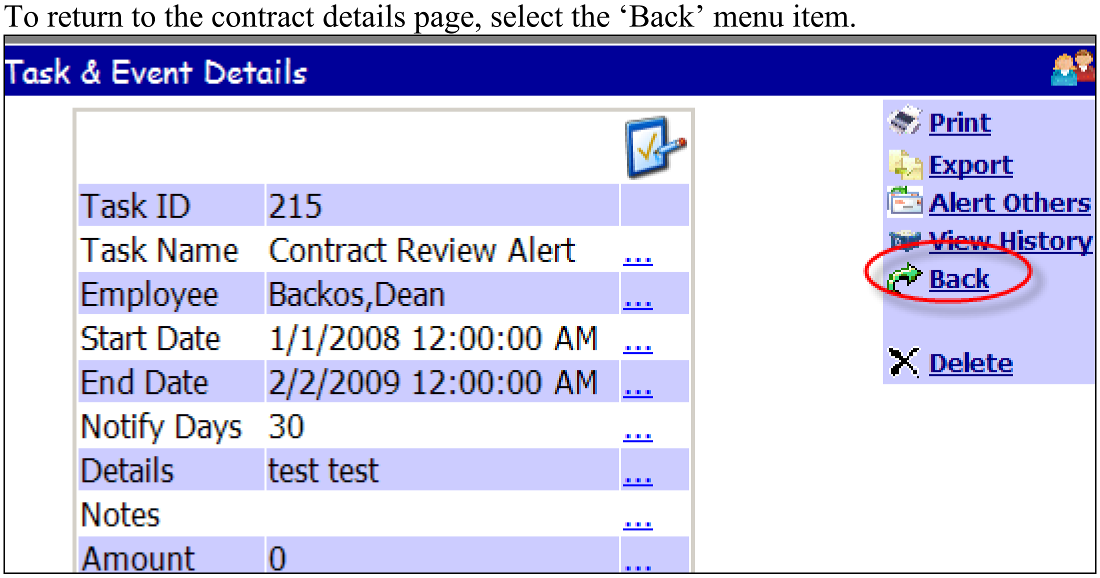
You can assign a task to other users and copy them on the task alert.

On a task detail screen, select 'alert others', next, select the names of the employees you want to add an additional alert to, select the blue arrow button to assign user (or the red arrow to remove users).

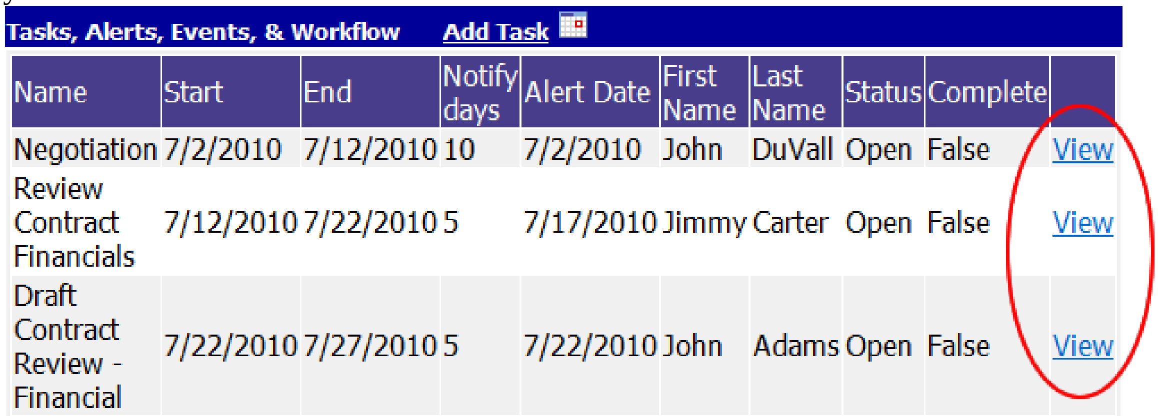
Select the 'back' menu item to return back to the task details screen.



To return to the contract details page, select the 'Back' menu item.

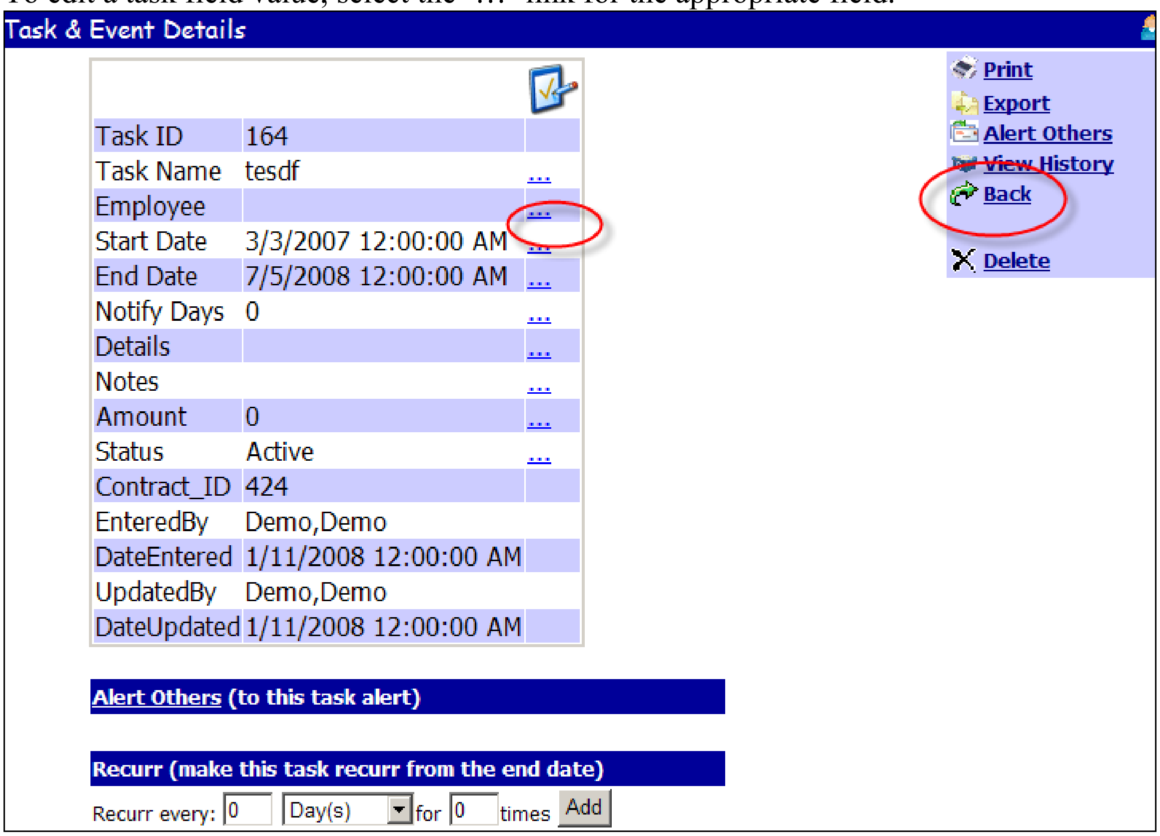


To edit a task, select the ‘edit’ link on the appropriate contract details screen for the task you want to edit.


Tasks, Alerts, Events, & Workflow Add Task

Name	Start	End	Notify days	Alert Date	First Name	Last Name	Status	Complete	
Negotiation	7/2/2010	7/12/2010	10	7/2/2010	John	DuVall	Open	False	View
Review Contract Financials	7/12/2010	7/22/2010	5	7/17/2010	Jimmy	Carter	Open	False	View
Draft Contract Review - Financial	7/22/2010	7/27/2010	5	7/22/2010	John	Adams	Open	False	View

To edit a task field value, select the ‘…’ link for the appropriate field.

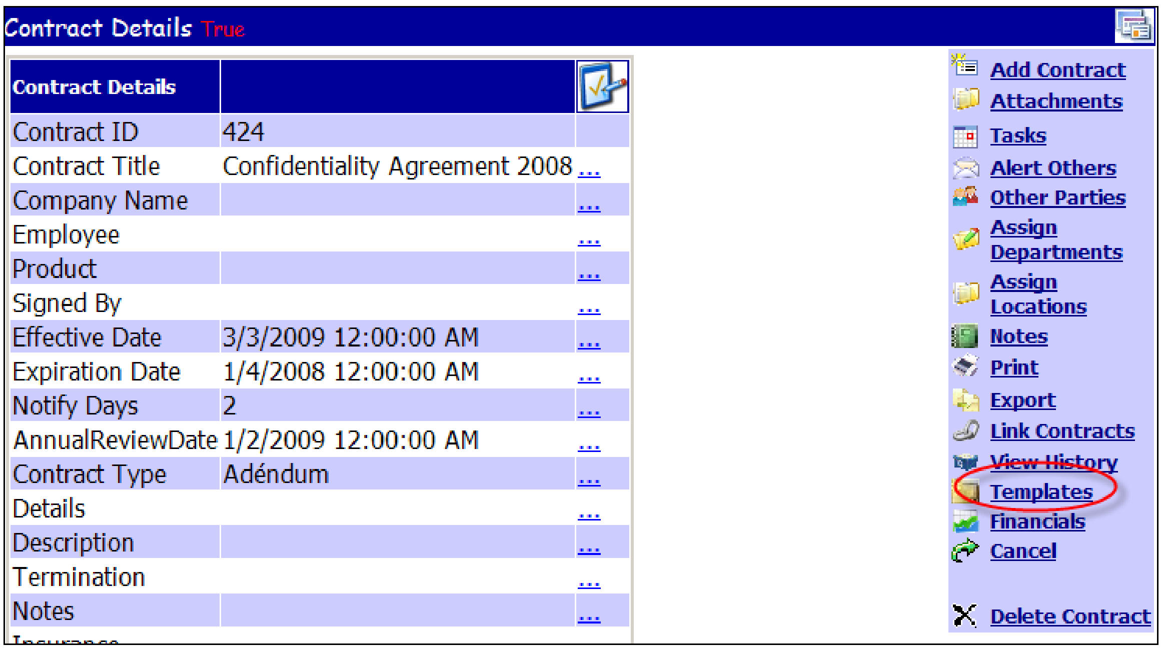


Task ID	164	
Task Name	tesdf	...
Employee		...
Start Date	3/3/2007 12:00:00 AM	...
End Date	7/5/2008 12:00:00 AM	...
Notify Days	0	...
Details		...
Notes		...
Amount	0	...
Status	Active	...
Contract_ID	424	
EnteredBy	Demo,Demo	
DateEntered	1/11/2008 12:00:00 AM	
UpdatedBy	Demo,Demo	
DateUpdated	1/11/2008 12:00:00 AM	

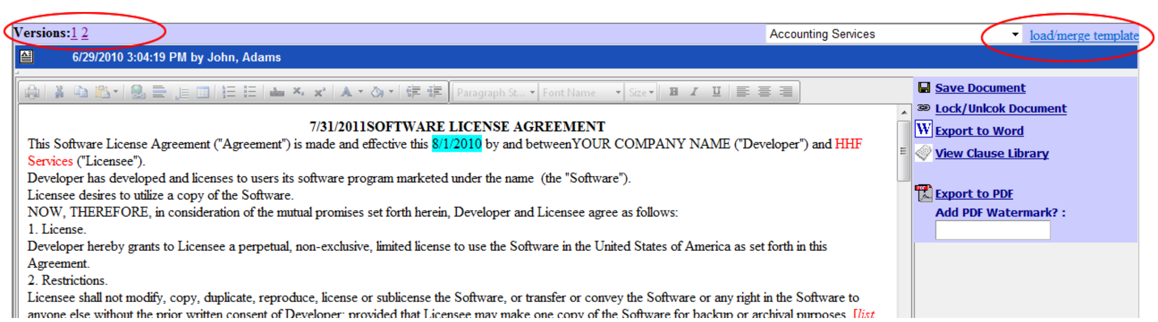
Loading and Assigning Templates to a Contract

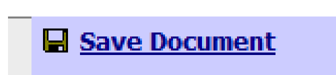
Contract Insight supports the ability to assign Contract Templates (discussed above) to the contracts that are entered in the system.

To load templates to a contract select "Templates" on the right menu.
The template will be copied from the Templates created by the Contract Administrator.



The template will be displayed as seen below and can be modified to the specific contract you are working on:

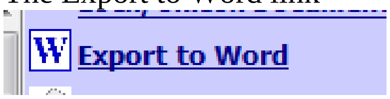


To save your changes select the save link. 

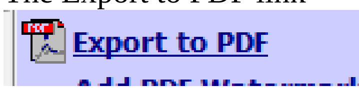
To make any modifications to this template, ensure that the document is unlocked. The document will always start off in a lock state, however to unlock it, click on the Lock/Unlock Link.

To view/preview the contract, click on one of the following options:

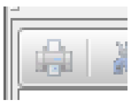
1. The Export to Word link



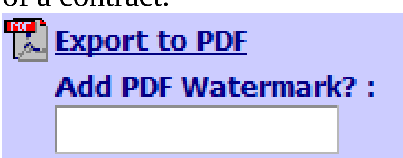
2. The Export to PDF link



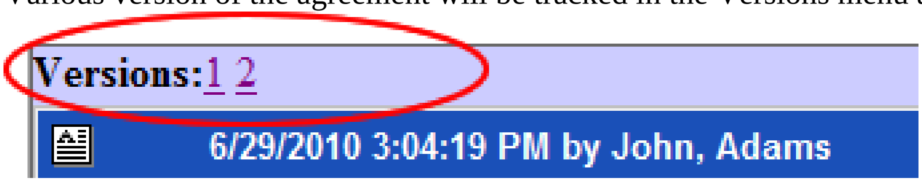
3. The Print document button



When exporting to PDF, optionally a Watermark text can be added that will be displayed on each page of the exported PDF. This is beneficial for keeping track of different drafts of a contract.

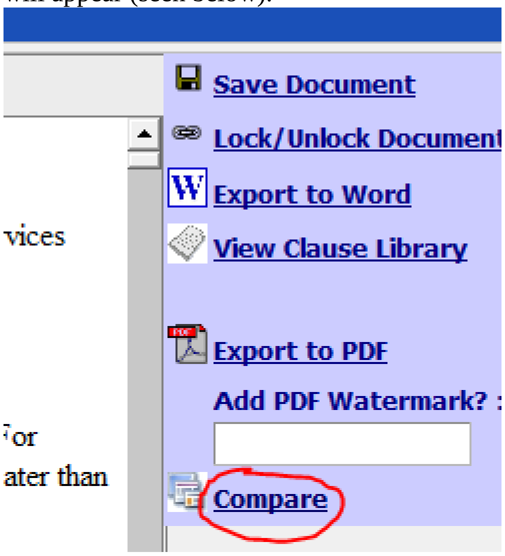


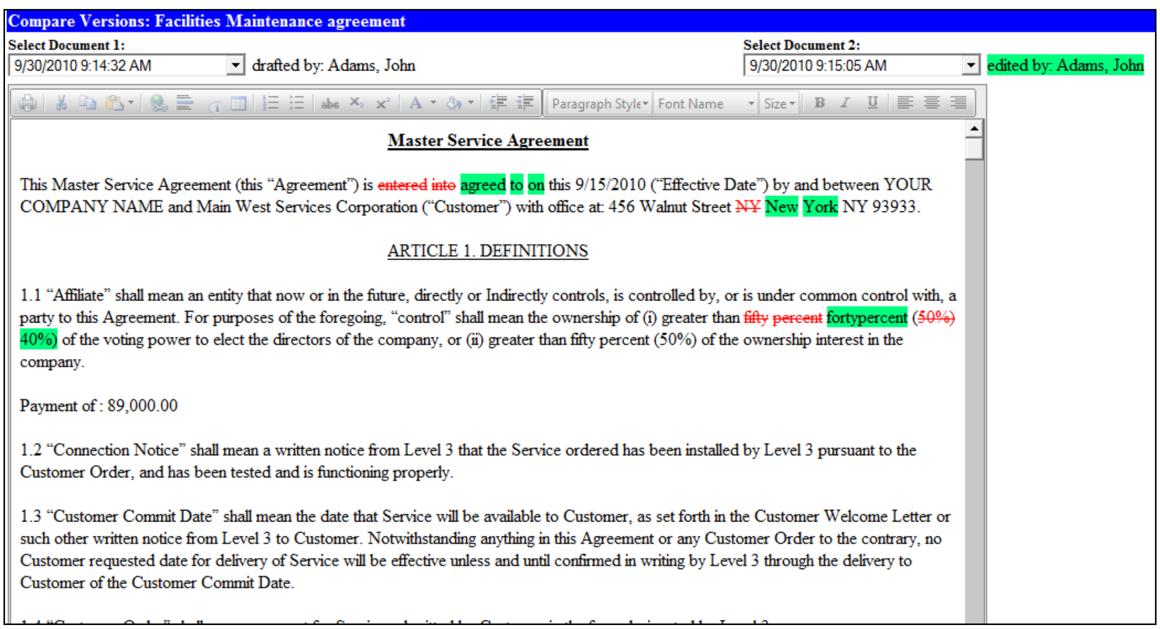
Various version of the agreement will be tracked in the Versions menu at the top.



Comparing Contracts with Redlining

Contract Insight Enterprise supports the ability to compare multiple versions of a draft contract via the template manager screen. The 'compare' menu item will appear if there are two or more versions of a draft template. Select the 'compare' menu from the contract's template screen and the Compare Versions screen will appear (seen below).



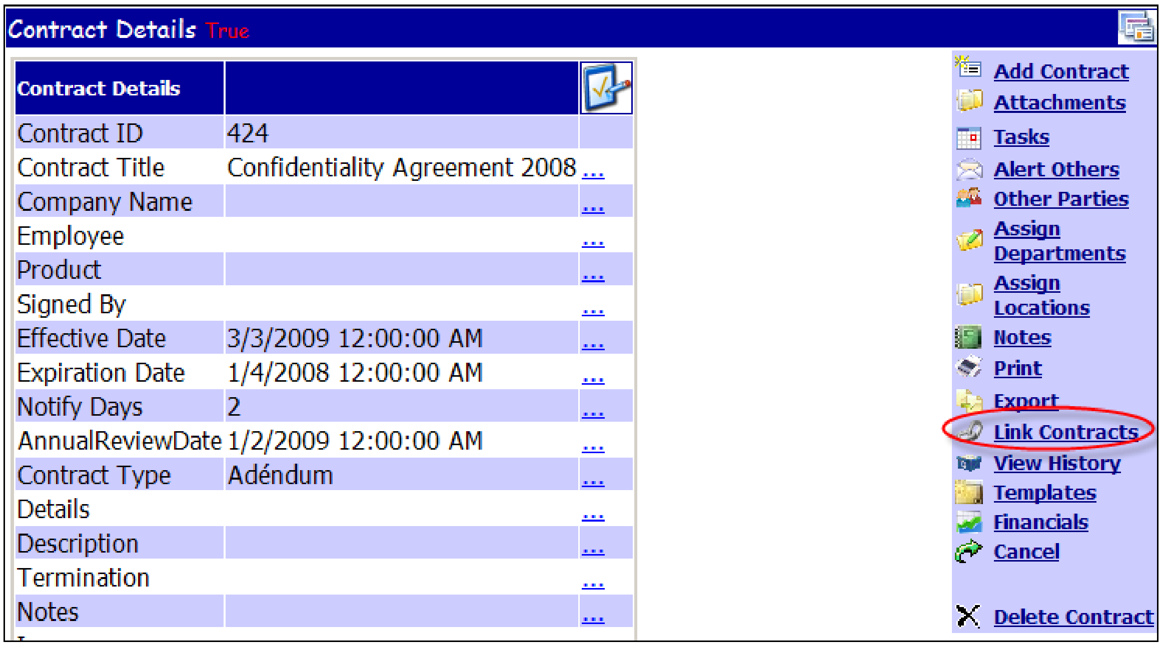


To compare versions of a drafted agreement, select the version (based on the draft date) in the left drop down box, next, select the version (based on the draft date) in the right drop down box. The compared and red-lined document will appear as seen above. For large document compares with many differences the comparison may take some time.

Linking and Associating Contracts

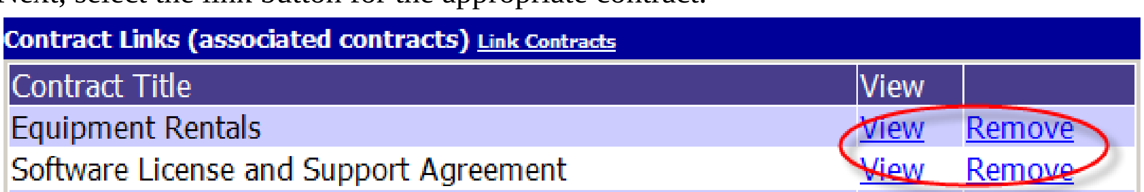
Contract Insight supports the ability to link one contract to another for improved tracking.

To link one contract to another select contract name from the drop down (as seen below) and then "Link Contracts" from the Contract Details Form.



Search for the contract you want to link to:

Next, select the link button for the appropriate contract.

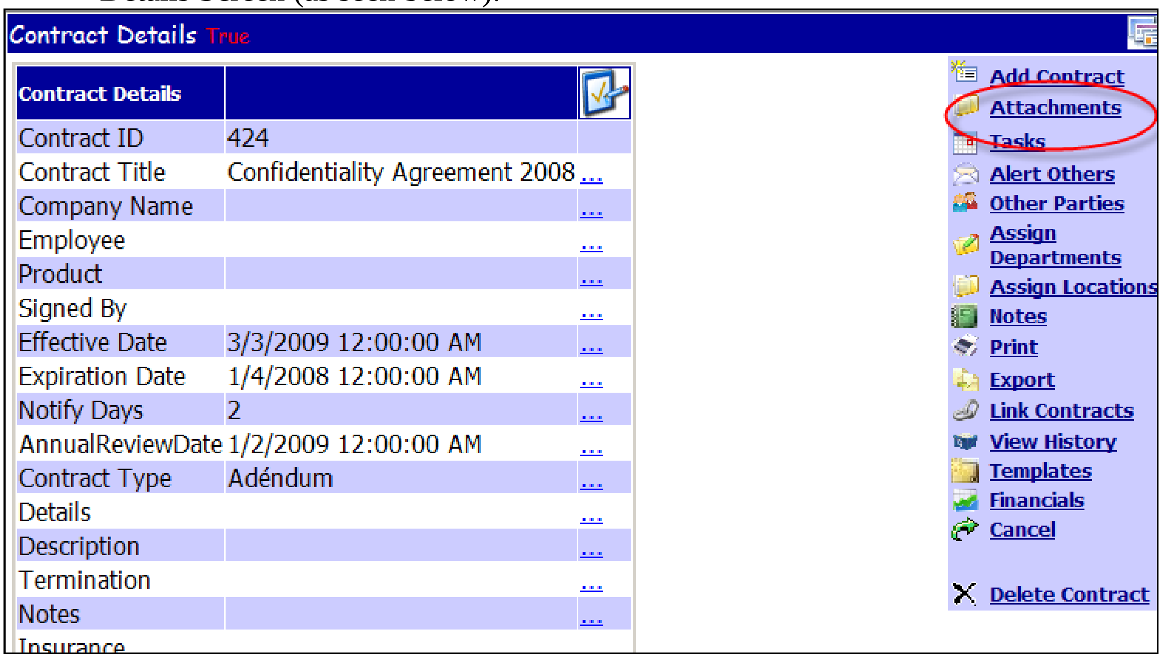


The linked contract will be listed as seen above. You can view the contract by select 'View' or remove the link by selecting 'Remove'.

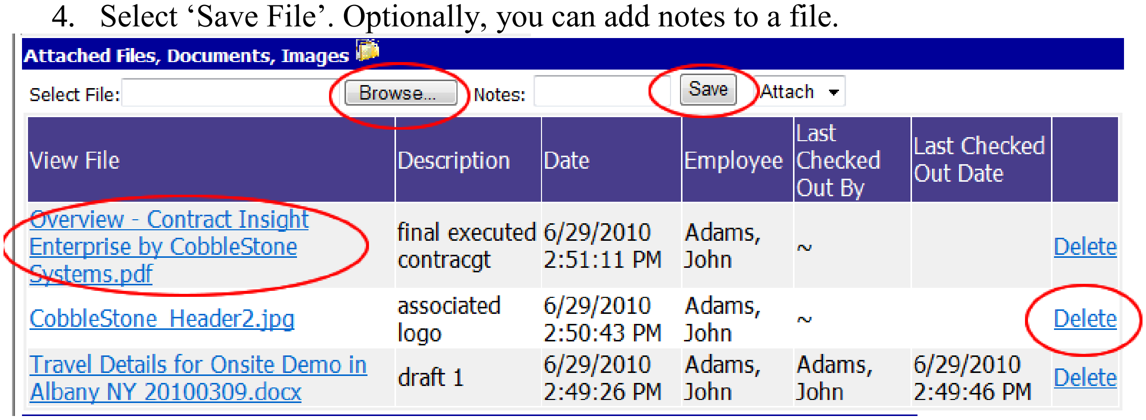
Uploading Images, Attaching Files and Scanned Images

Contract Insight supports the ability to attach and upload files of any file type and scanned images.

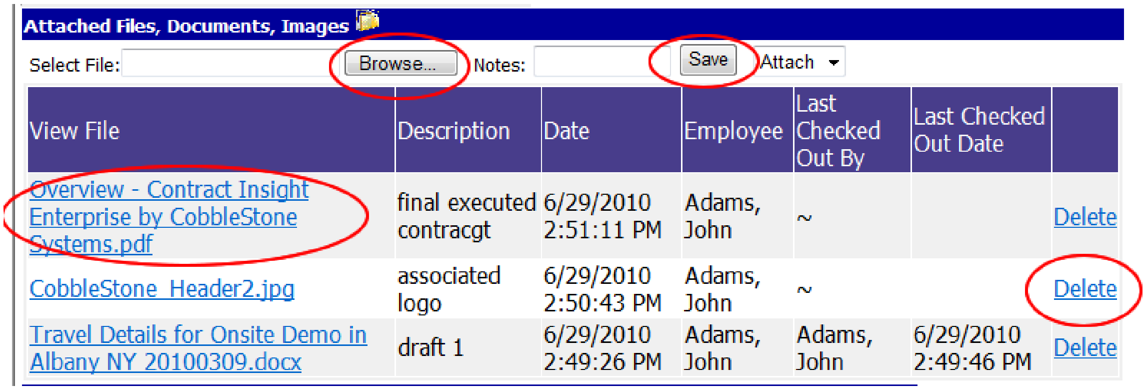
1. To upload files to a contract, select the “Attachments” button from the Contract Details Screen (as seen below).



2. Select “Browse” to locate the files or scanned images on your computer (similar to a standard web upload process).
3. Select “Attach” or “Link” to specify what type of attachment. (Attach will upload the file into the system, while Link will only make a link to the folder on the computer the file is located in)
4. Select ‘Save File’. Optionally, you can add notes to a file.



Uploaded scanned images and files will appear at the bottom of the contract screen. To open the file, click the filename.



Attached Files, Documents, Images

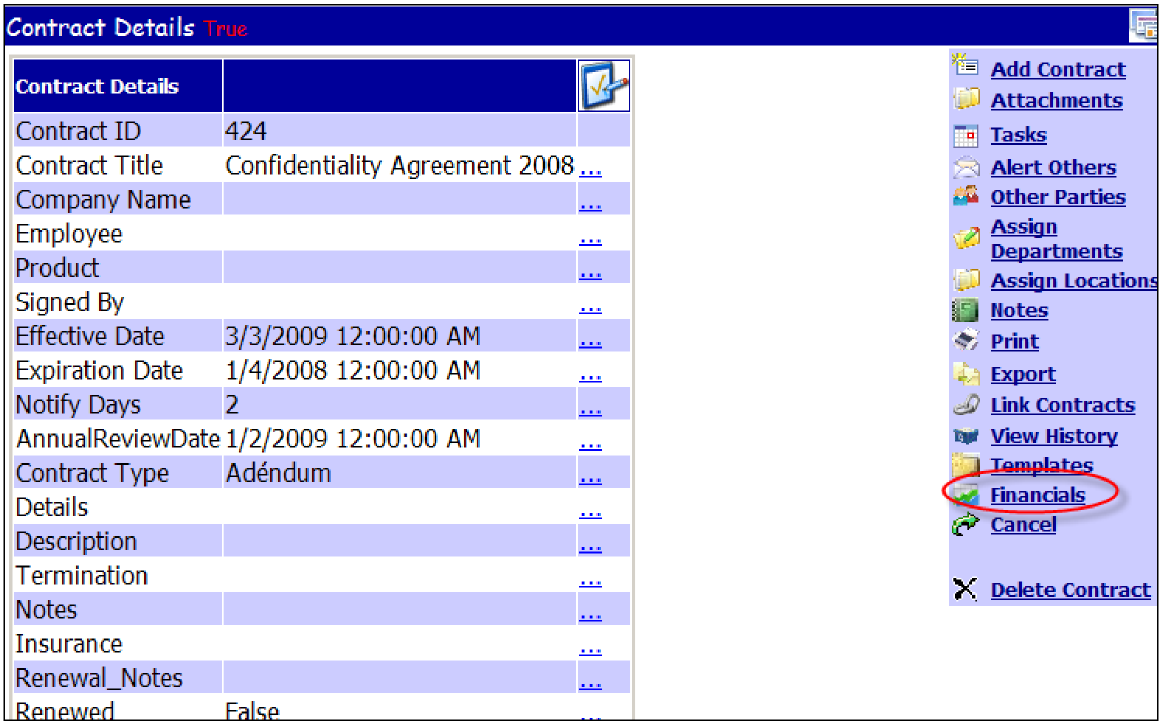
Select File: Browse... Notes: Save Attach

View File	Description	Date	Employee	Last Checked Out By	Last Checked Out Date	
Overview - Contract Insight Enterprise by CobbleStone Systems.pdf	final executed contracgt	6/29/2010 2:51:11 PM	Adams, John	~		Delete
CobbleStone_Header2.jpg	associated logo	6/29/2010 2:50:43 PM	Adams, John	~		Delete
Travel Details for Onsite Demo in Albany NY 20100309.docx	draft 1	6/29/2010 2:49:26 PM	Adams, John	Adams, John	6/29/2010 2:49:46 PM	Delete

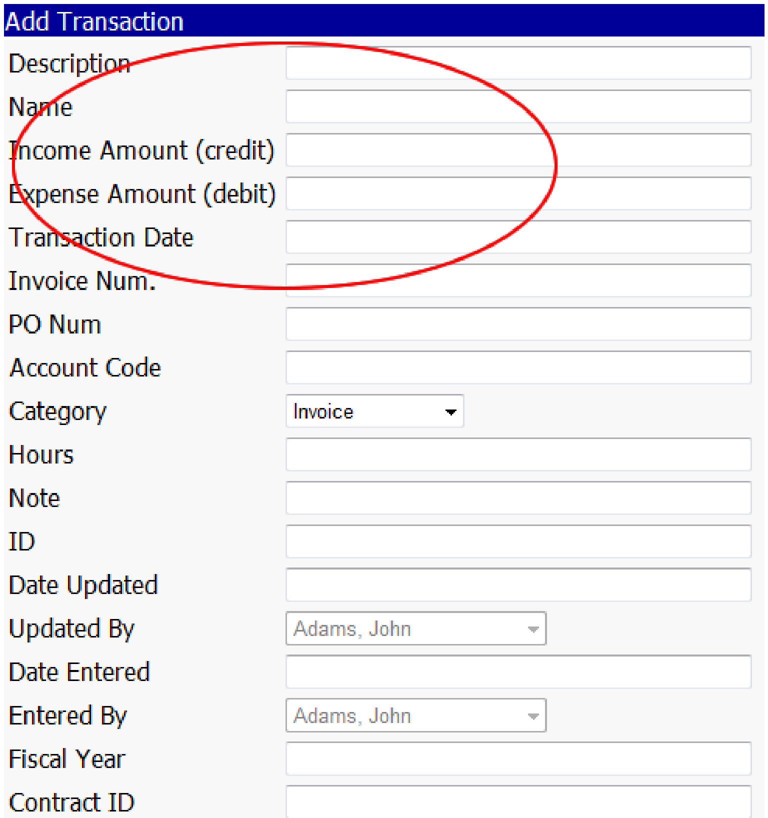
Add and Tracking Financial Information

Contract Insight supports the ability to track financial information about your contracts. For example, you can track income, expenses, and payments for your contracts.

1. To add financial transactions to your contract select “Transactions” button from the Contract Details screen.



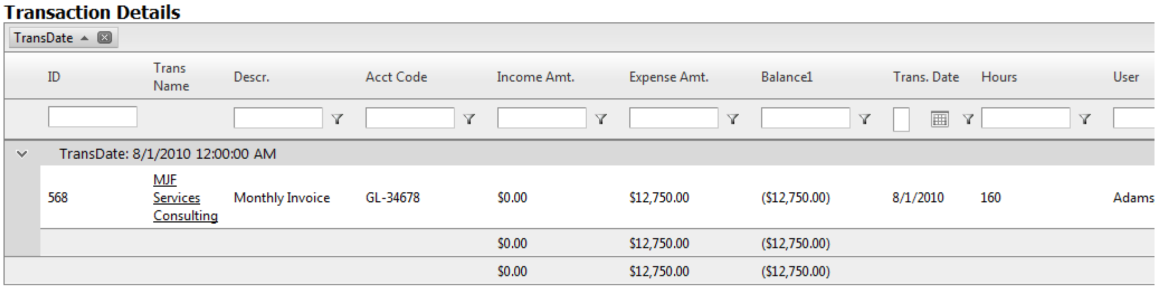
2. Enter in the transaction details as seen



below.

3. Your transactions will be display in a “spreadsheet” format as seen below. (The first spreadsheet grid will show the details of each transaction, while the second spreadsheet grid will show a summary of all the financials)

Transaction Details



TransDate

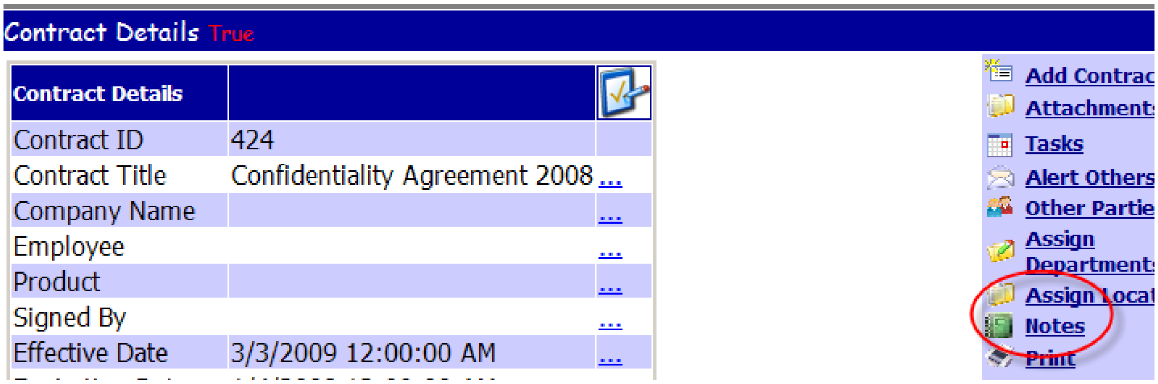
ID	Trans Name	Descr.	Acct Code	Income Amt.	Expense Amt.	Balance1	Trans. Date	Hours	User
TransDate: 8/1/2010 12:00:00 AM									
568	MJF Services Consulting	Monthly Invoice	GL-34678	$0.00	$12,750.00	($12,750.00)	8/1/2010	160	Adams
				$0.00	$12,750.00	($12,750.00)			
				$0.00	$12,750.00	($12,750.00)			

Financial Summary

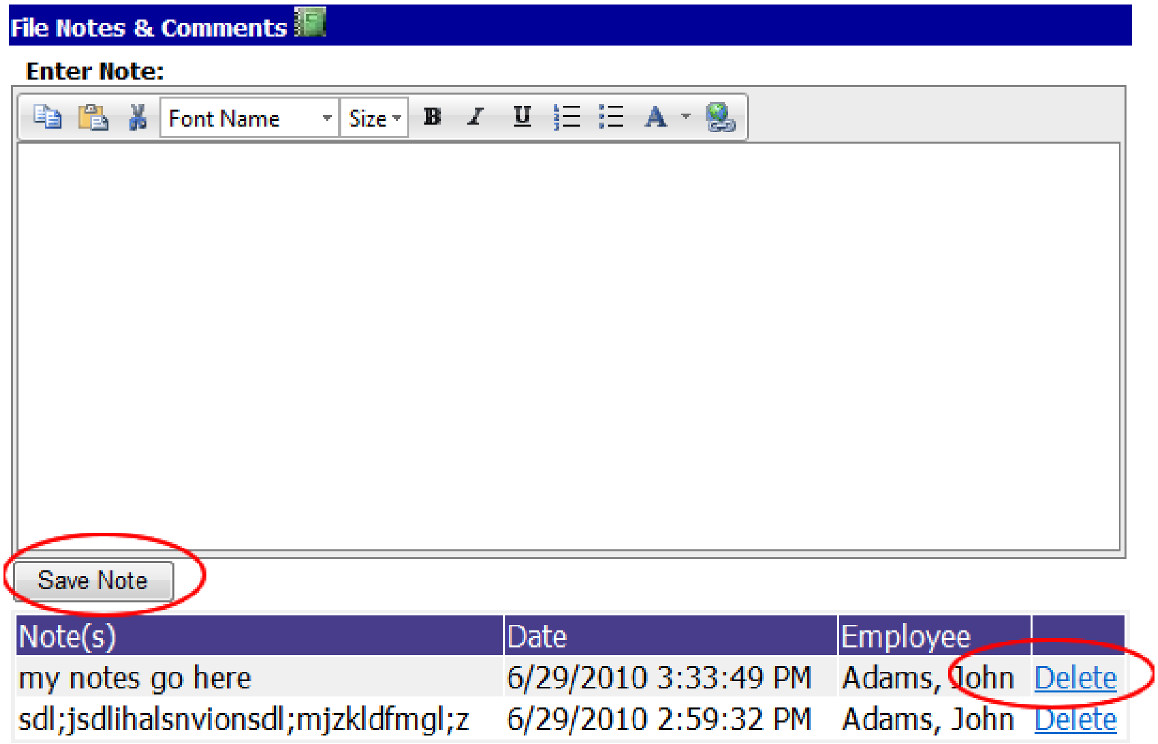
Company Name	Contract ID	Contract Title	End Date	Start Date	Credit/Inc. Sum	Debit/Exp. Sum	Budget Amt.	Actual/Incurred Amt.	Budget Bal.
MJF Services	1793	SFFCU Test	7/31/2011	8/1/2010	$0.00	$12,750.00	$413,000.00	($12,750.00)	$400,250.00

Adding Notes

Contract Insight supports the ability to add unlimited notes to individual contracts. This can be used to document events or notes.



Enter your notes in the box below and select the "Save Note' button. The notes will be displayed below the notes entry box. To delete a note, select the 'Delete' link next to the correct note line.

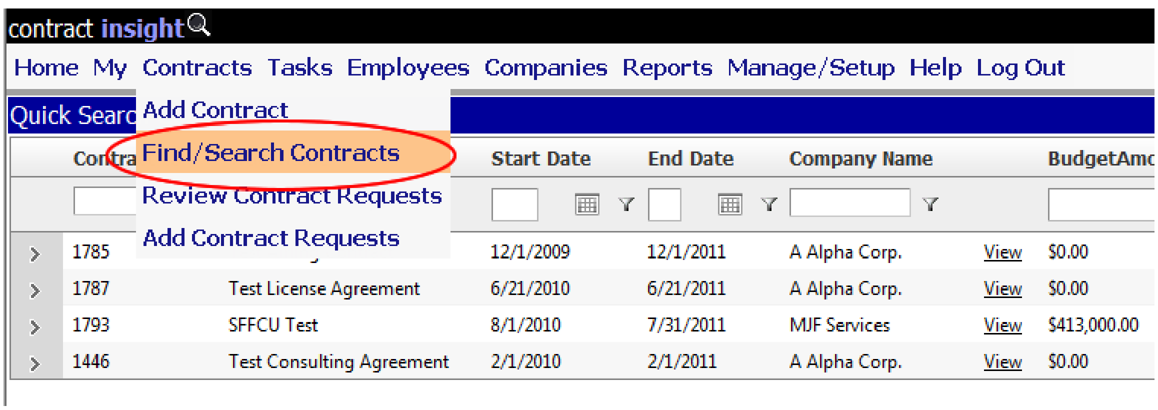


Finding and Searching Contracts

You can find contracts in the system in many ways. The easiest way to find a contract is via the "Quick Search" option on the top menu.

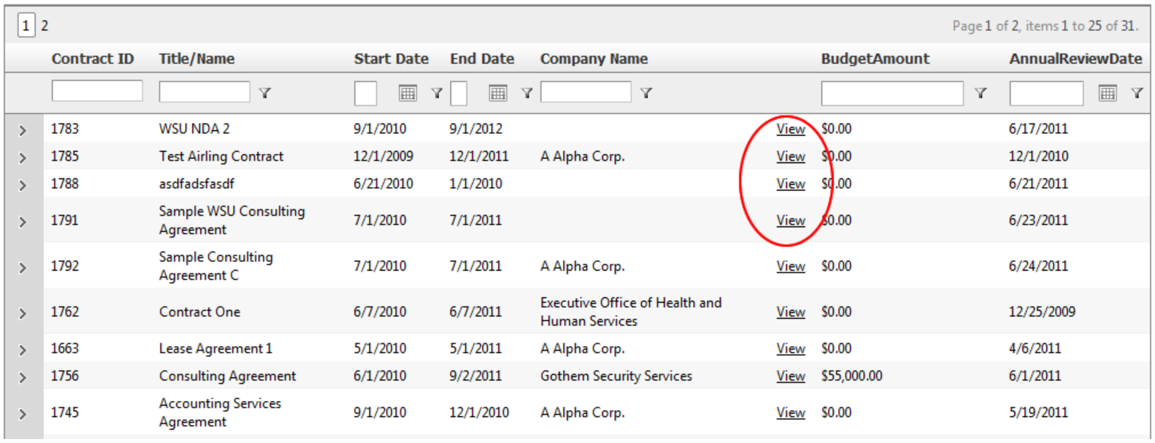
Enter in your search criteria and select 'go'. The system will display any contract matching the text you entered based on the contract fields.

To obtain more control over your search, select the "Find/Search Contracts' menu.



Select the field to be searched and the criteria from the "Contract Find" screen and select the corresponding button (as seen below).

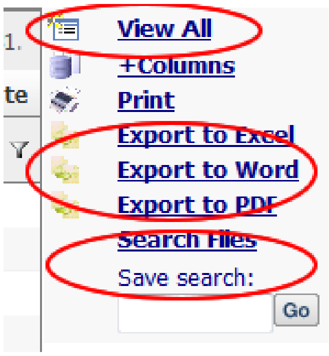
Your search results will be displayed as seen below.



1 2 Page 1 of 2, items 1 to 25 of 31.

Contract ID	Title/Name	Start Date	End Date	Company Name		BudgetAmount	AnnualReviewDate
1783	WSU NDA 2	9/1/2010	9/1/2012		View	$0.00	6/17/2011
1785	Test Airling Contract	12/1/2009	12/1/2011	A Alpha Corp.	View	$0.00	12/1/2010
1788	asdfadsfasdf	6/21/2010	1/1/2010		View	$0.00	6/21/2011
1791	Sample WSU Consulting Agreement	7/1/2010	7/1/2011		View	$0.00	6/23/2011
1792	Sample Consulting Agreement C	7/1/2010	7/1/2011	A Alpha Corp.	View	$0.00	6/24/2011
1762	Contract One	6/7/2010	6/7/2011	Executive Office of Health and Human Services	View	$0.00	12/25/2009
1663	Lease Agreement 1	5/1/2010	5/1/2011	A Alpha Corp.	View	$0.00	4/6/2011
1756	Consulting Agreement	6/1/2010	9/2/2011	Gothem Security Services	View	$55,000.00	6/1/2011
1745	Accounting Services Agreement	9/1/2010	12/1/2010	A Alpha Corp.	View	$0.00	5/19/2011

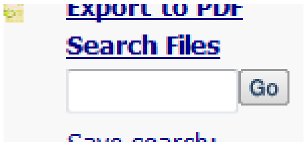
To view or edit a contract select the “view” link from the results.



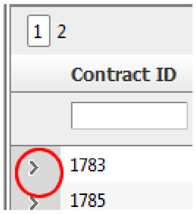
Additionally there is the “View All” link on the right hand menu, which returns the results of all contracts within the system.

Once the grid contains the results of your search, it can be exported to Excel, Word or PDF.

If Full Text Indexing is enabled for the system, the Search Files link in the right hand menu will search through all attachments that have been “Attached” to the system for whatever word or phrase is typed into its text box.



Note: These files will be viewable by click on the left hand arrow in the results grid



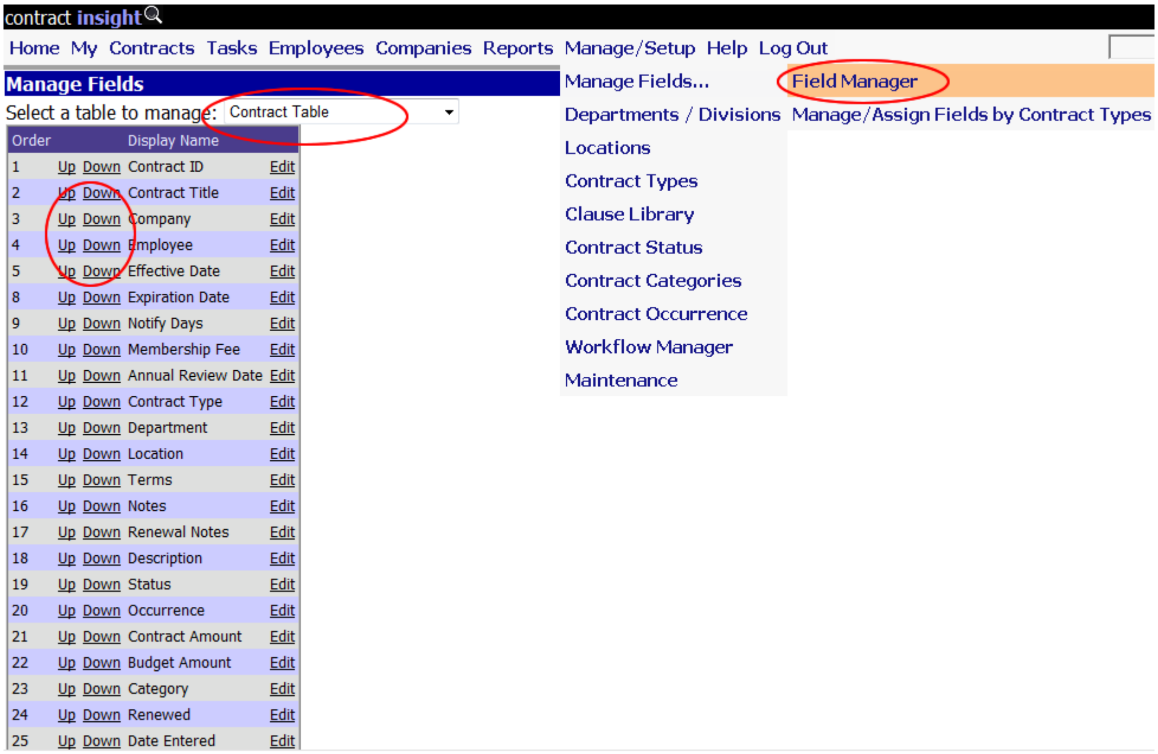
Custom User Defined Fields Overview

Field Manager

Contract Insight supports the ability to create global user defined fields. Contract Administrators with the appropriate permissions can create global user-defined fields.

To create a custom fields for all Contracts and screens follow the instructions below:

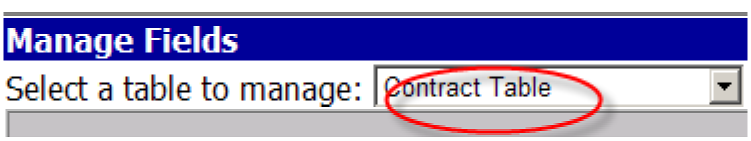
Select the 'Field Manager' menu option:

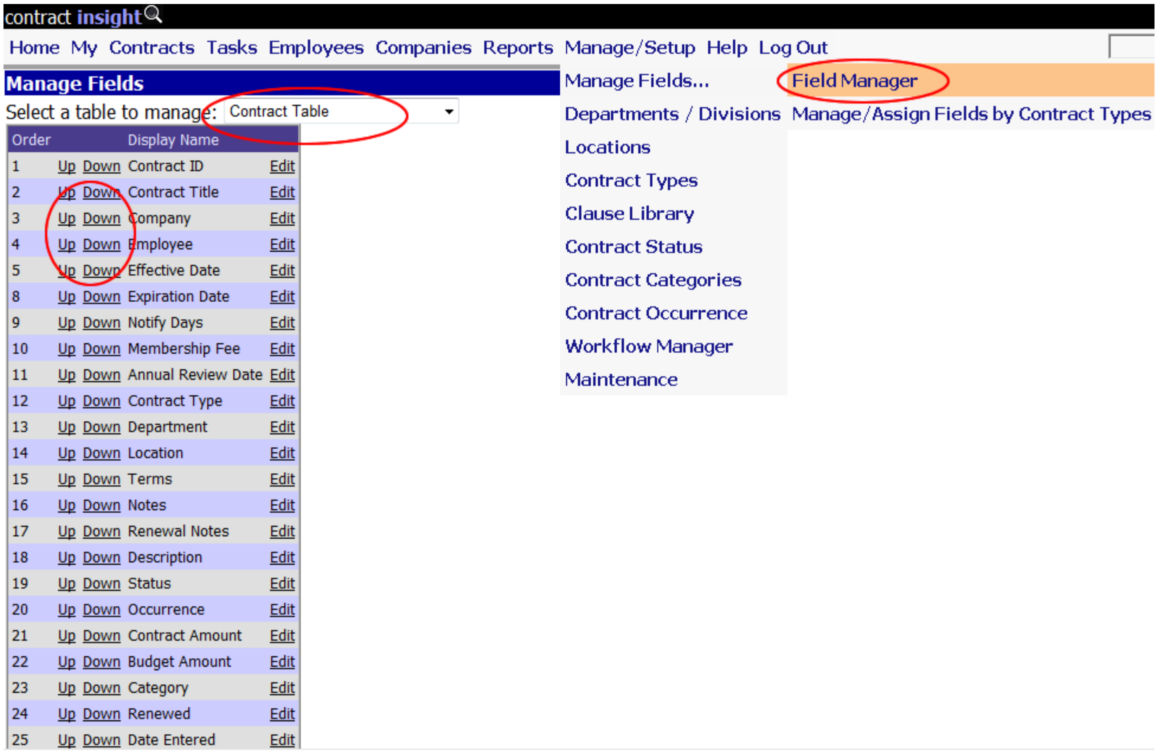


Select the table:

1. Select the table from the list box that you would like to create and manage fields for (as seen below).

2. This will show the field selector screen (as seen below).

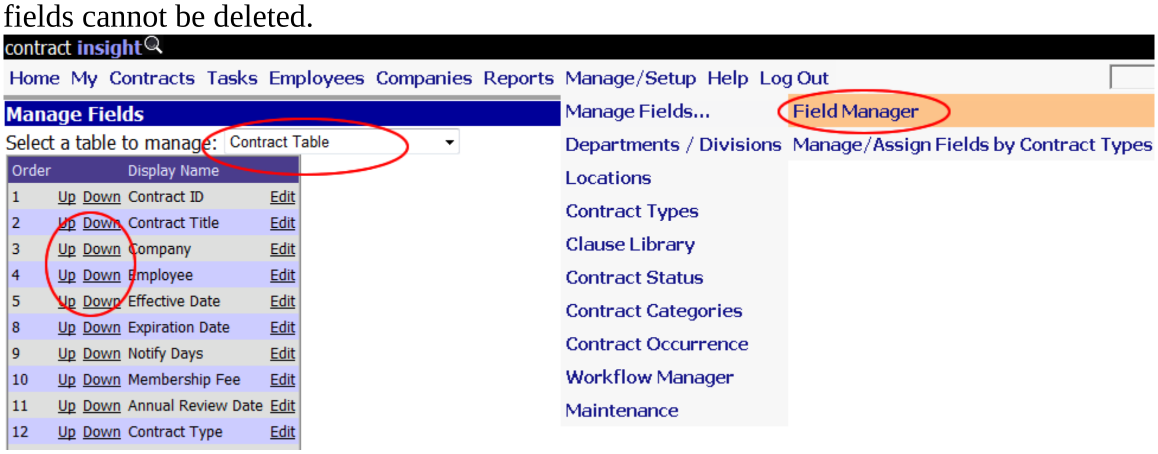




You can edit description and move fields up or down. You may assign fields per contract type as well.

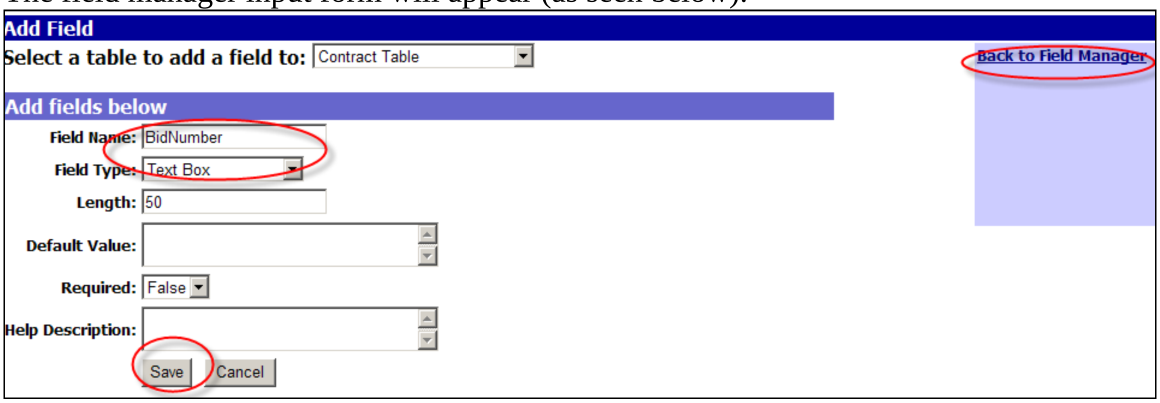
Field Manager

1. After selecting the table; all the field names and field types will be displayed. NOTE: Optional: this interface can be utilized to scroll through the records and make data changes (there is no undo option - all changes are final). If there are user fields entered, you will be presented with the option to manage the field values and/or delete the custom field. NOTE: all changes are final and cannot be undone; system fields cannot be deleted.



2. To add User Defined Fields, select the "Add Field" button.

3. The field manager input form will appear (as seen below).



4. Enter in the Field Name, Field Type (select from list), Field Length, and Default Value (as seen above). NOTE: You can select the following field types from the list box (text, integer, money, date, or drop down).
    1. ***Text.*** The text field type can be used to save characters or a mix of characters and numbers. The text field type will create a "varchar" data type in the underlying table.
    2. ***Integer.*** The integer field type can be used to save integer numeric values. This can be used for whole numbers.
    3. ***Money.*** The Money field type can be used to create a field that can save currency data.
    4. ***Date.*** The Date field type can be used to create custom fields that can save dates. Dates should be formatted as "mm/dd/yy" or "mm/dd/yyyy".
    5. ***Drop Down.*** The Drop Down field type can be used to create a custom field that contains list items to pick from. Enter the list items (separated by commas) in the default value box.
    6. ***Multi-Select***. The Multi-Select field type can be used to create a custom field that contains list items to pick from. This differs from a Drop Down in that the user can select multiple items from the list. Enter the list items (separated by commas) in the default value box.
5. Once all fields are entered select the "Save" button and the custom fields will be saved. NOTE: The system will not permit duplicate custom field names.

6. After the custom field is created; you will return to the Field Manager Form where your custom fields will be displayed. You can manage your Drop Down list items and your fields from this interface.

Advanced Field Notes

- All user defined custom fields are saved to the table source with the prefix of "u_" appended to the field name. The end user will not see the "u_" prefix.
- The Drop Down field types are saved to the table as a varchar(50) data type.
- User defined field names cannot be modified.
- User defined fields can be deleted however, this action is permanent and all associated data saved in the user defined field is deleted.
- System defined fields cannot be deleted or modified without customization.

Assigning Fields by Contract Type

The system allows admin user to assign fields by contract type. This allows yoursystem so display assigned fields for each contract type. This is optional, however, the default fields will show on a contract that are set up in the field manager for the Contract Table/Screen (refer to the field manager section for more information).

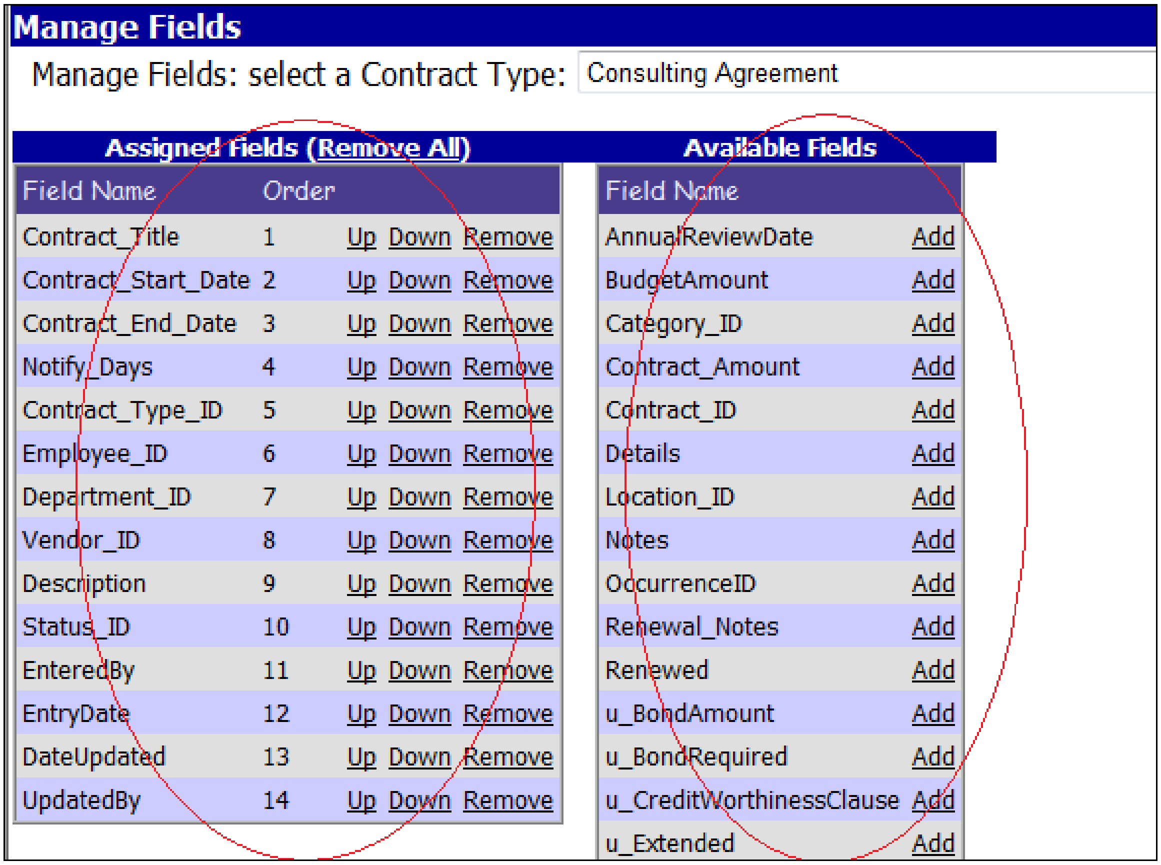
To assign fields by contract type:

1. Log into the system as an admin user

2. Navigate to the field manager screen using the 'Manage/Setup' menu (see below)

3. Next the 'Manage Fields by Contract Types' screen will appear

4. Next, select the type of contract that you would like to assign fields to (below we selected the Consulting Agreement contract type and assigned common fields (see below).

5. 

6. NOTE: The fields names show the data base field names (not the friendly names). However, on the actual contract screen, the end users will see the friendly field names that were assigned via the field manager.

7. You may order, add, and remove fields that are assigned to each contract type.

8. NOTE: The following fields are required: Contract_ID (Contract Number), Vendor_ID (Company Name), Employee_ID (Employee Name), Contract_Start_Date (Start Date), Contract_End_Date (End Date), NotifyDays (Notify Days), Contract_Title (Contract Title/Name), Contract_Type_ID (Contract Type), Department_ID (Department), Entry Date, Date Updated, Entered By, and Updated By.

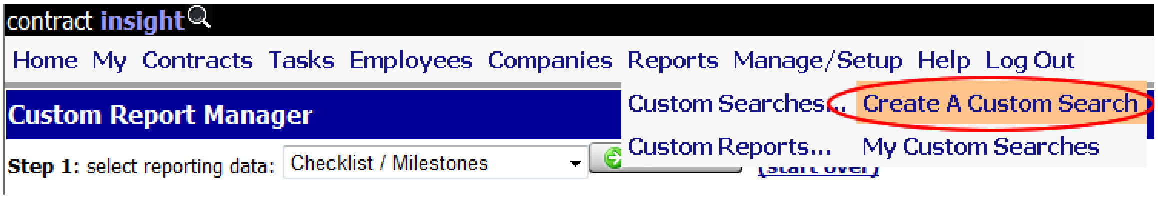
Custom Searches Overview

Ad-hoc Query Builder

To create a custom search or an ad-hoc query follow the instructions below:

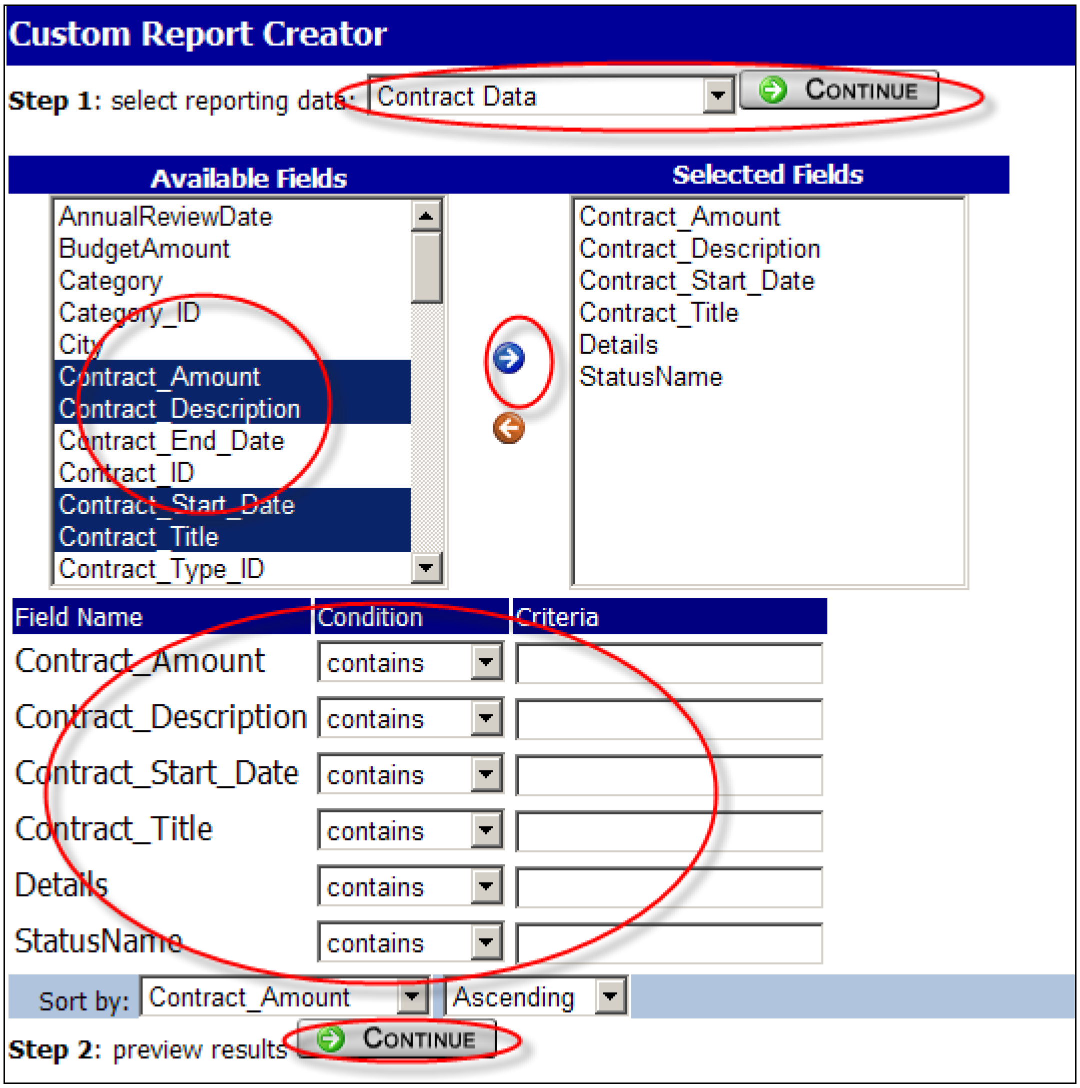
Select the table:

1. Select the "Create A Custom Search" under the "Custom Searches" link in the Reports menu item



2. Select the table from the list box that you would like to report on (as seen below).

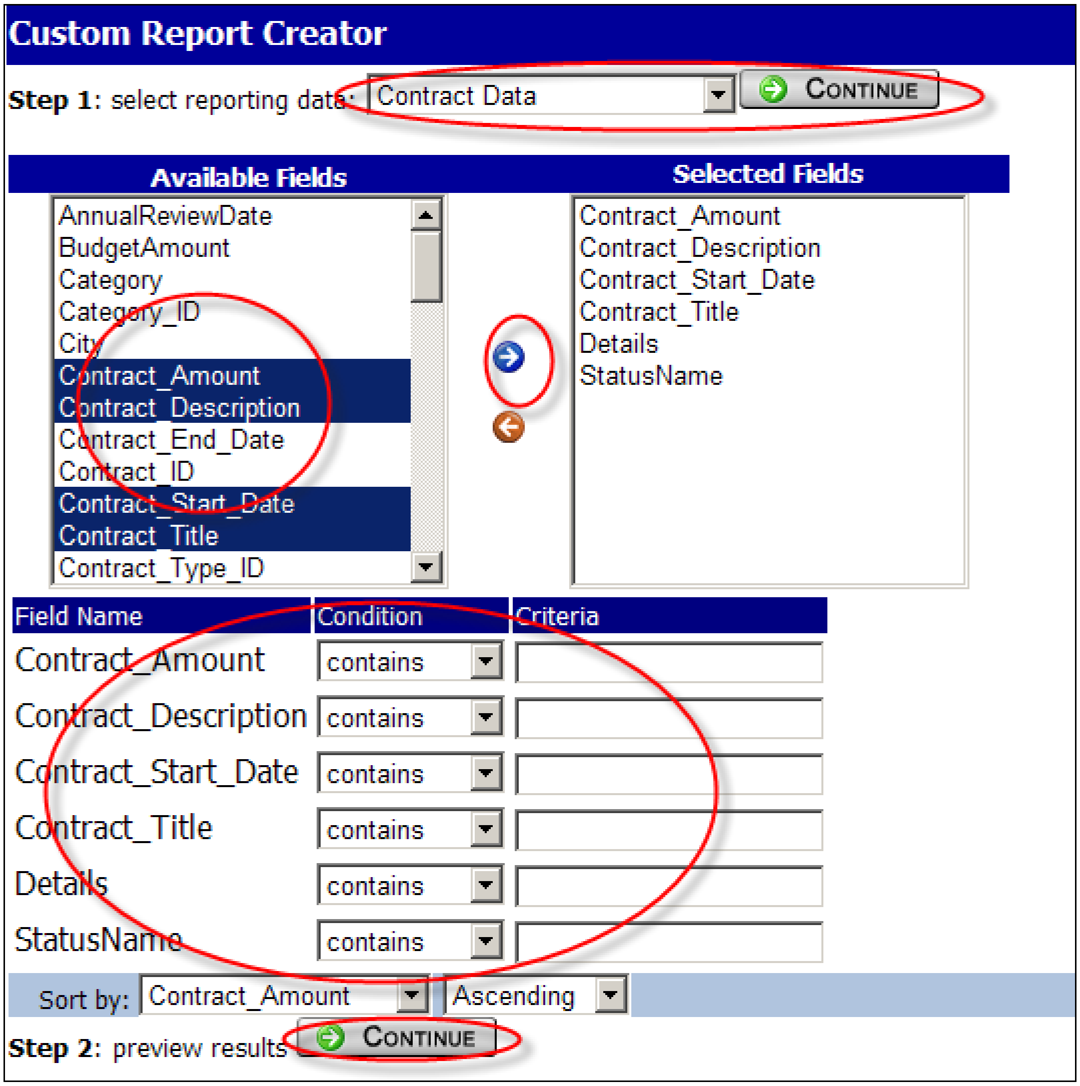
3. This will show the field selector and report writer screen (as seen below).



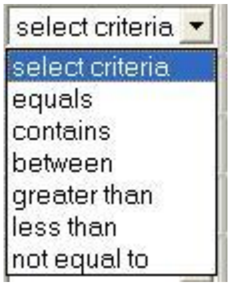
Select the fields, field criteria, and values

1. The field selector, field name, where clause and criteria values will appear for the table selected above (as seen below).

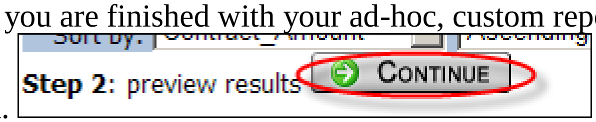
2. Select the fields that you would like to see in the ad-hoc query by checking or un-checking the check boxes to the left of the fields. All fields are preselected by default.

3. 

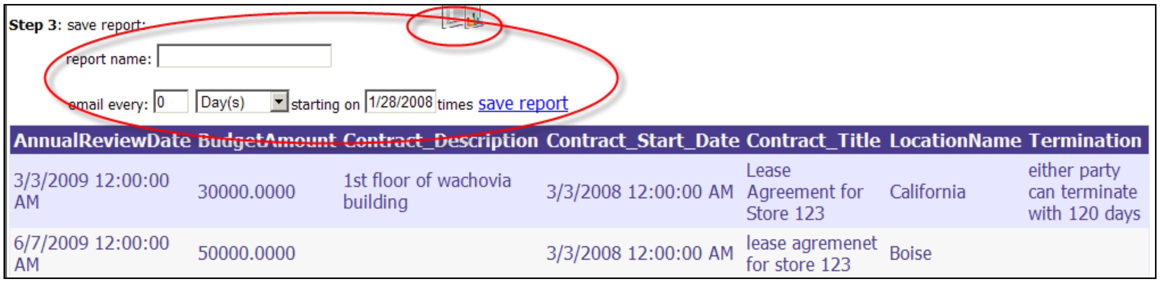
4. Select the "Where" clause from the where column for the fields you would like to narrow your query by. You can select from multiple "Where" options (like: equals, between, greater than, less than, contains, and not equal to). NOTE: If you do not select “Where Clause” criteria, the value criteria will not be considered in the query.

5. 

   - ***equals***. Use the "equals" where clause for making exact searches or entering items in a list using the "," (comma) as a list separator. NOTE: When searching on currency values do not enter the "," (comma) as a value (the comma is a reserved word for separating list items).
   - ***contains***. Use the "contains" where clause for finding words or phrases in *varchar* and *text* fields (like a search engine). For example, if you want to find all contracts that have the word "pencil" in the "product" field, select "contains" as the where clause and enter pencil as the criteria.
   - ***between***. Use the "between" where clause for finding values that fall between (and including) two values. For example, if you want to find all contracts that have a "Contract_End_Date" between 2/2/2002 and 4/2/2002, select "between" as the where clause and "2/2/2002 and 4/2/2002" as the criteria. NOTE: when using the between clause be sure to enter a starting value and an ending value with the work "and" in the center. The between clause will only be considered in your query on field types of money, dates, and numbers.
   - ***greater than***. Use the "greater than" where clause for making exact searches that are greater than the value you enter. For example, to find all contracts with a Contract Amount greater than $5,000, select the "greater than" item as the Where Clause and enter in "5000" (without commas) in the Criteria Value field. NOTE: Only single criteria values will be considered in the query. The greater than clause will only be considered in your query on field types of money, dates, and numbers.
   - ***less than***. Use the "less than" where clause for making exact searches that are less than the value you enter. For example, to find all contracts with a Contract Amount less than $5,000, select the "less than" item as the Where Clause and enter in "5000" (without commas) in the Criteria Value field. NOTE: Only single criteria values will be considered in the query. The less than clause will only be considered in your query on field types of money, dates, and numbers.
   - ***not equal to*** . Use the "not equal to" where clause for making exact searches or entering items that do not match the criteria that is entered. NOTE: When searching on currency values do not enter the "," (comma) as a value (the comma is a reserved word for separating list items).

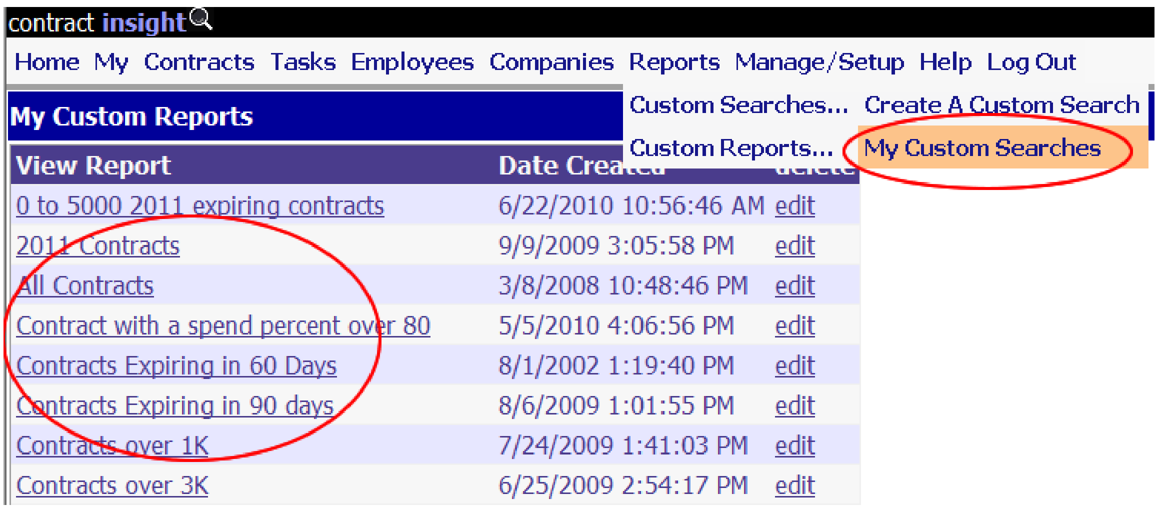
6. When you are finished with your ad-hoc, custom report, select the "Continue" button. 

7. If the ad-hoc query created can be parsed, your results will be displayed.



8. To save your custom search, enter the report name, in the box above the search results and select 'save report'.

9. To view or re-run a custom report select the "My Custom Searches" menu item under "Custom Searches…" and select the name to re-run the report.



10. To clear your search values and start over select the "Start Over" button.

Advanced Ad-hoc Searches

Below are some more advanced reporting and querying tips.

- Dates. If you are searching on dates you can use the keyword "getDate()" (without quotes) to indicate the current date.
- Dates. You can use the getDate() keyword and add or subtract days as your criteria. For example, use "getDate() + 60" (without quotes) as your criteria to find all contracts that are expiring over 60 days from the current date.
- GetDate(). Returns the current system date.
- SubQueries. The "equals" where criteria support sub queries. This means that a sub query can be entered in as a criteria value. Tip: to ensure that your SQL can be parsed, test it in the custom report builder.

My Custom Ad-hoc Searches

Once a Contract Administrator creates a custom search and assigns a user the appropriate permission to view and run the report, the report will be displayed on the user's "My Custom Searches" within "Custom Searches.." under the Reports top menu item.

Any custom searches assigned to the current user will be displayed as seen below:

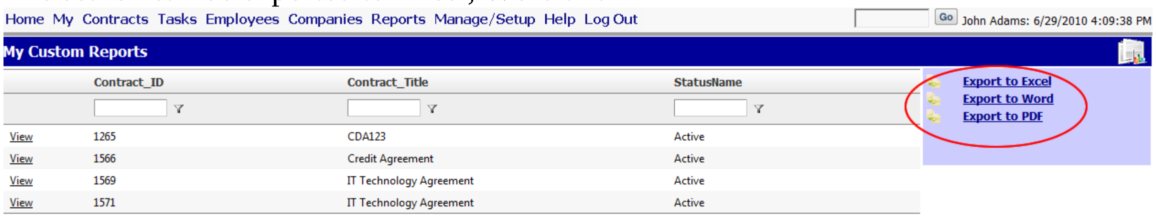
The user can run the search to view the results by selecting the search name. The results may be e-mailed.

Exporting Ad-hoc Query Results

Contract Insight includes the ability to export query results to a wide variety of standard formats.

To export ad-hoc query results select the export type from the right hand menu links (see below):

The search can be exported to Excel, Word and PDF



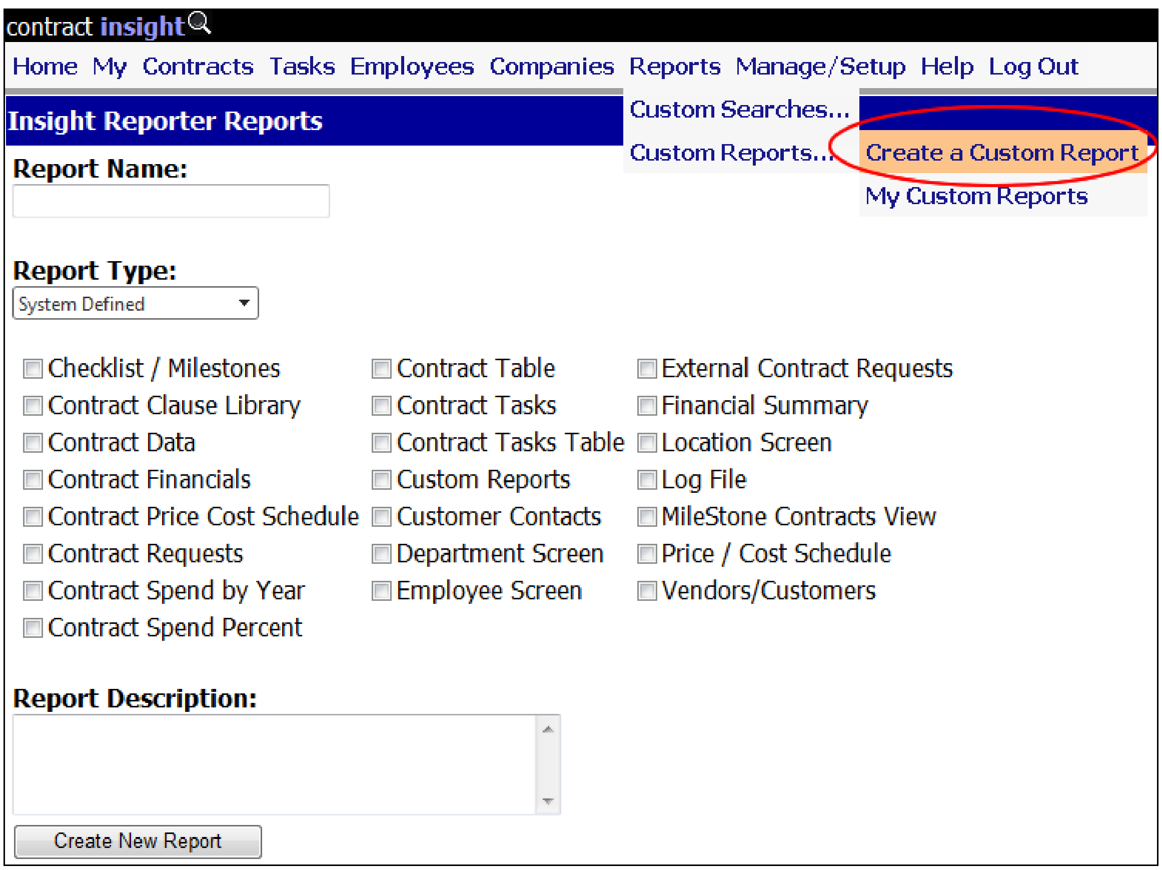
Custom Online Report Builder Overview

Online Report Builder

To create a report builder report, follow the instructions below:

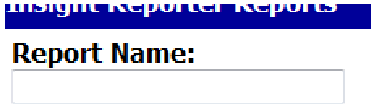
Select the table:

1. Select the “Create A Custom Report” under the “Custom Reports” link in the Reports menu item

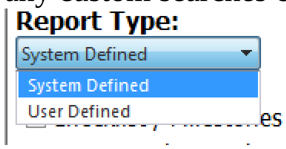


2. Provide the requested information for what areas of the system you want the report builder to work with (as seen below).

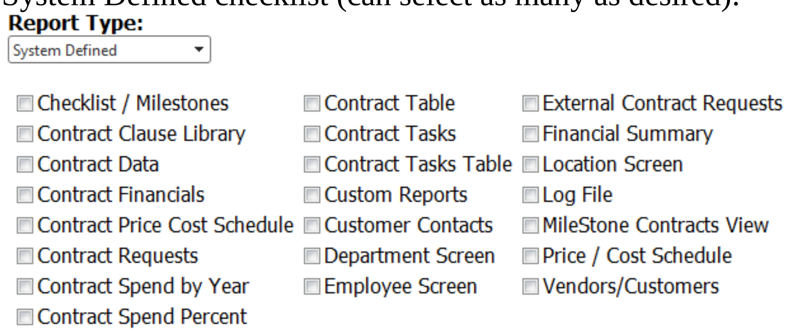
1. Provide the name of this new Report



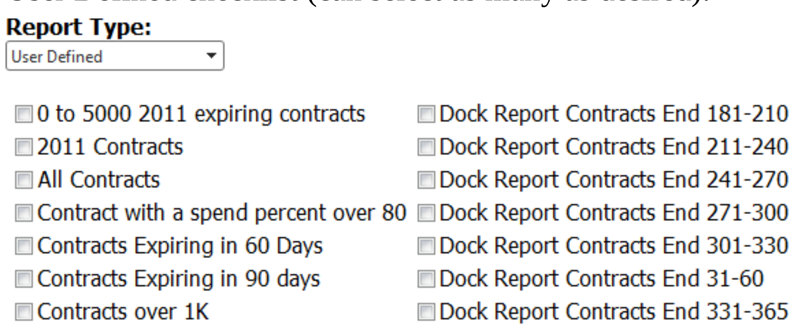
2. Select the type of report data to work with (System Defined are the standard reporting areas of the system, where-as User Defined will list off any custom searches created in the system)



   1. System Defined checklist (can select as many as desired):

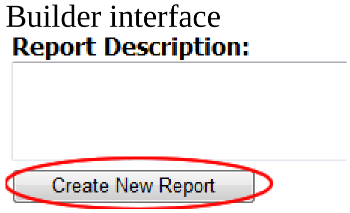


   2. User Defined checklist (can select as many as desired):

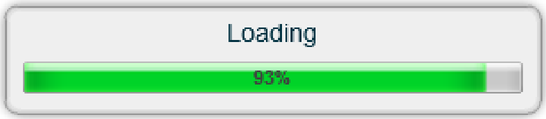


3. Provide a description for this report (if necessary)

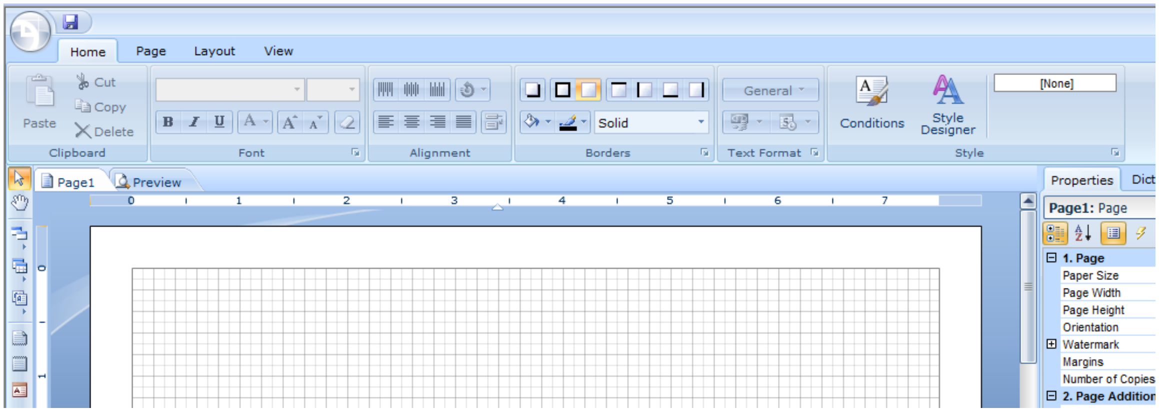
3. Click on the "Create New Report" button to generate and load the Online Report Builder interface



The online interface will load, showing the following screen image



Once the Report Builder interface has loaded the following screen will be available for use

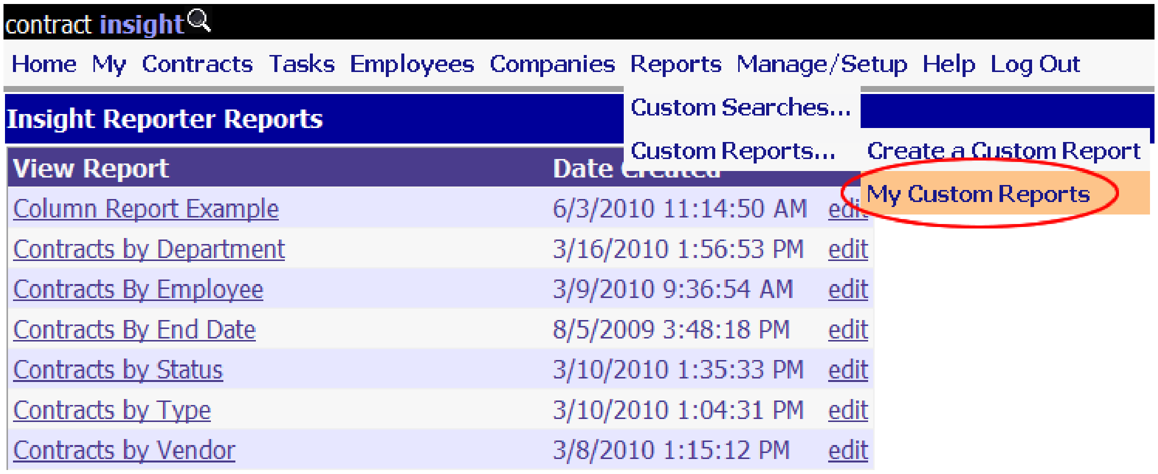


For detailed instructions and utilization of CobbleStone's Online Report Builder, please follow this link:
http://cobblestonesystems.com/contract_management_software_enterprise_user_manual.aspx

My Report Builder Reports

Once a Contract Administrator creates a report builder report and assigns a user the appropriate permission to view and run the report, the report will be displayed on the user's "My Custom Reports" within "Custom Reports.." under the Reports top menu item

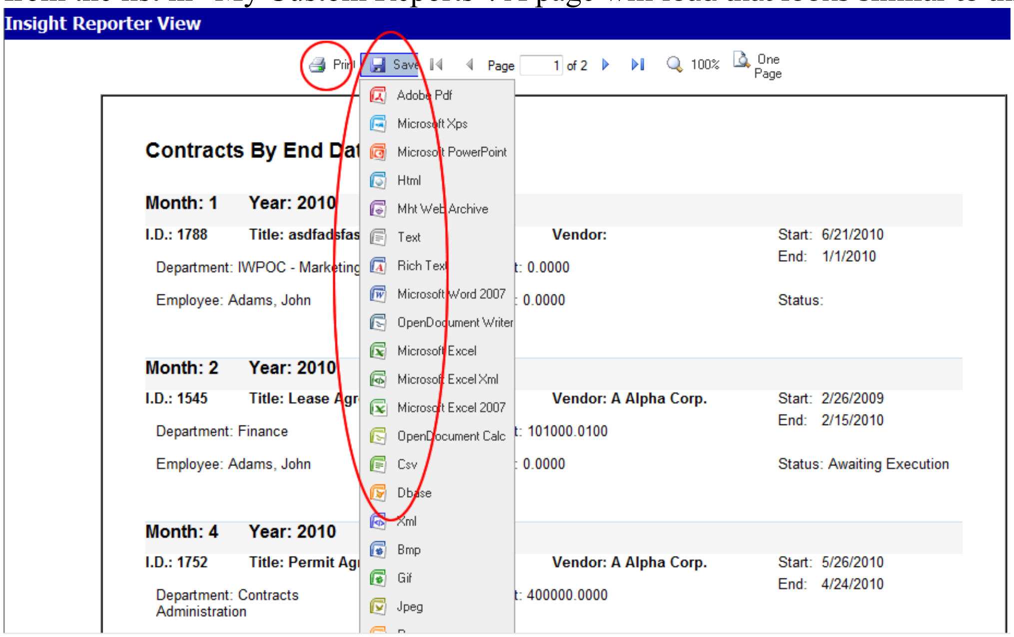
Any custom searches assigned to the current user will be displayed as seen below:



The user can view the resulting online report by selecting the report name.

Viewing/Exporting Report Builder Reports

To run a previously created report from the report build, click on the name of the report from the list in "My Custom Reports". A page will load that looks similar to this



The report will be completely displayed within the black outlined box (with the ability to page through the results).

In addition the report can be printed directly from the page by clicking on the print icon

The report can also be exported into just about any file format desired by selecting the save icon and then specifying the export type

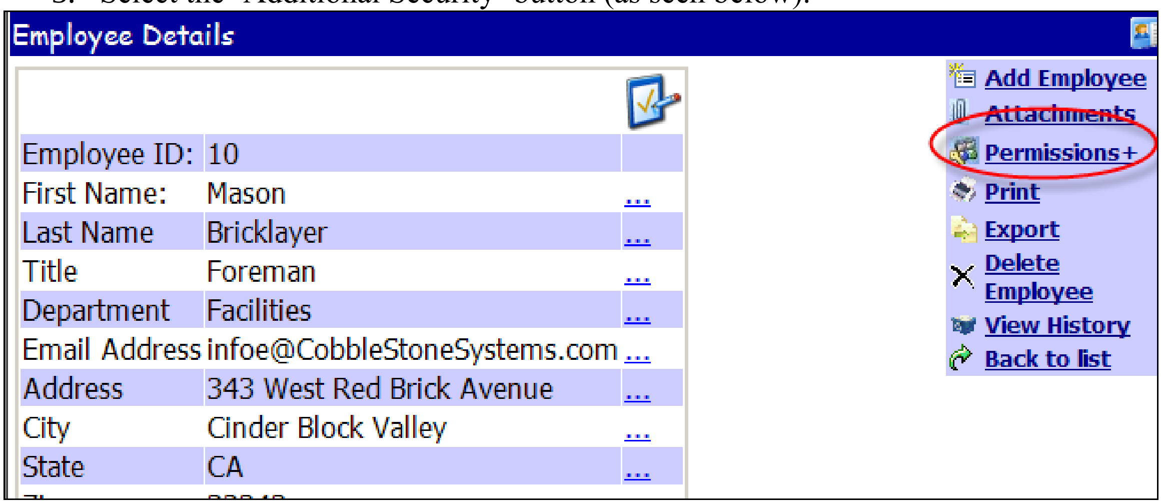
Security

Additional User Security Options

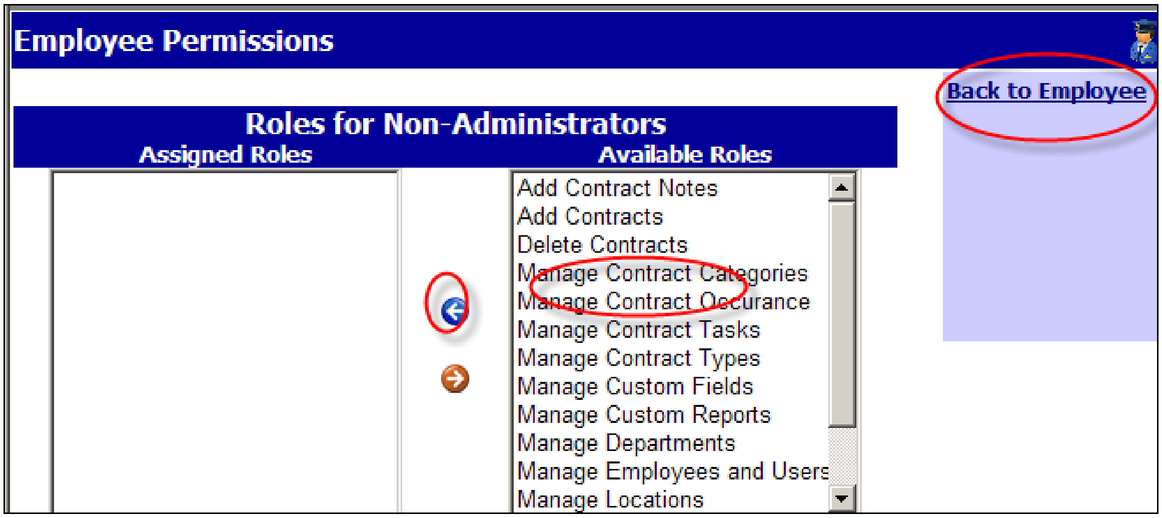
The Additional User Security Options offer the administrations of the system to assign additional management authority to 'non-admin' level users.

Additional Users Security Options are assigned to a user on a per user basis via the Employee Manager screen. The following steps describe how to access the Additional User Security Options:

1. Log into Contract Insight as an 'Admin' level user
2. Select the Employee from the Employee Lists that require additional security options
3. Select the 'Additional Security' button (as seen below).



4. Next, select the security role from the available security list (see below) that you want to assign to the selected user and click the Add/Remove arrow button. This will add the security role select to the 'assigned security' list box.
5. To remove security roles from a user's profile, select an 'assigned security' role in the 'assigned security roles' list box and click the Add/Remove arrow button.



Available Security Roles

1. The ‘Manage Employees and Users’ security role permits a user to add, edit, and delete employees/users from the system.
2. The ‘Manage Vendor and Customers’ security role permits a user to add, edit, and delete Vendors and Customers.
3. The ‘Manage Contract Categories’ security role permits a user to add, edit, and delete Contract Categories.
4. The ‘Manage Contract Types’ security role permits a user to add, edit, and delete Contract Types.

Logging Out

To log out of the system select "Logout" from the left menu.

Installation Procedures

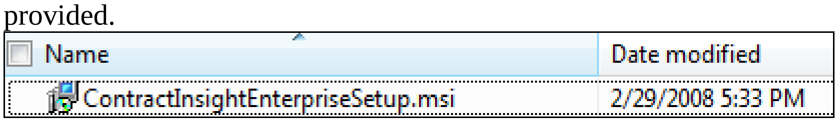
Our team of experts will work closely with our clients to implement Contract Insight. Below is an overview of our installation process.

Requirements:

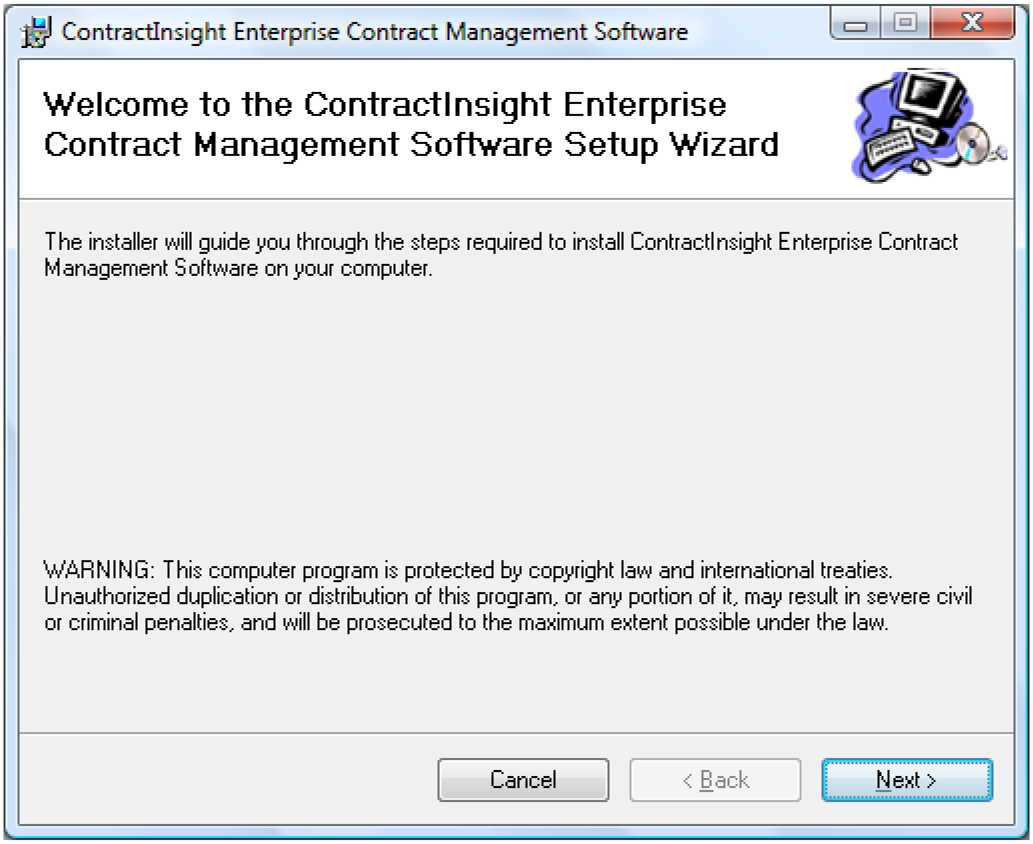
1. Windows Server (2000, 2003, 2008, or better) with Internet Information Services and Windows SMTP Services with .NET 2.0 Framework or better.
2. Microsoft SQL Database Server 2000, 2005, 2008, or better
3. At least 1 GB of free disk space after the installation of the operating system and database. Estimate 5 MB of disk space required for each contract record.
4. 1 GB of RAM memory of better

IIS Configuration for Contract Insight

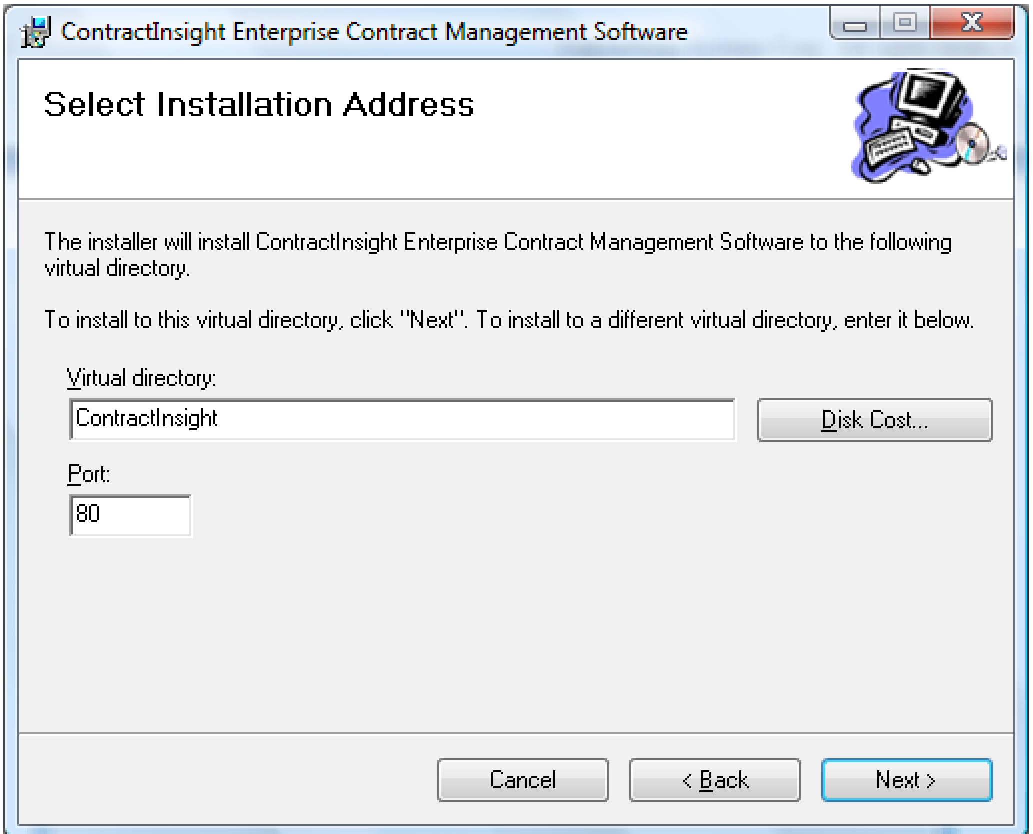
For the purpose of these installation instructions the contract management program is located on a Sub-Web named ContractInsight. You may alter the web (virtual web) if needed. You would follow the same instructions for setting up the web as a standalone (instructions may vary between Windows 2000, 2003, 2008 servers/operating systems).

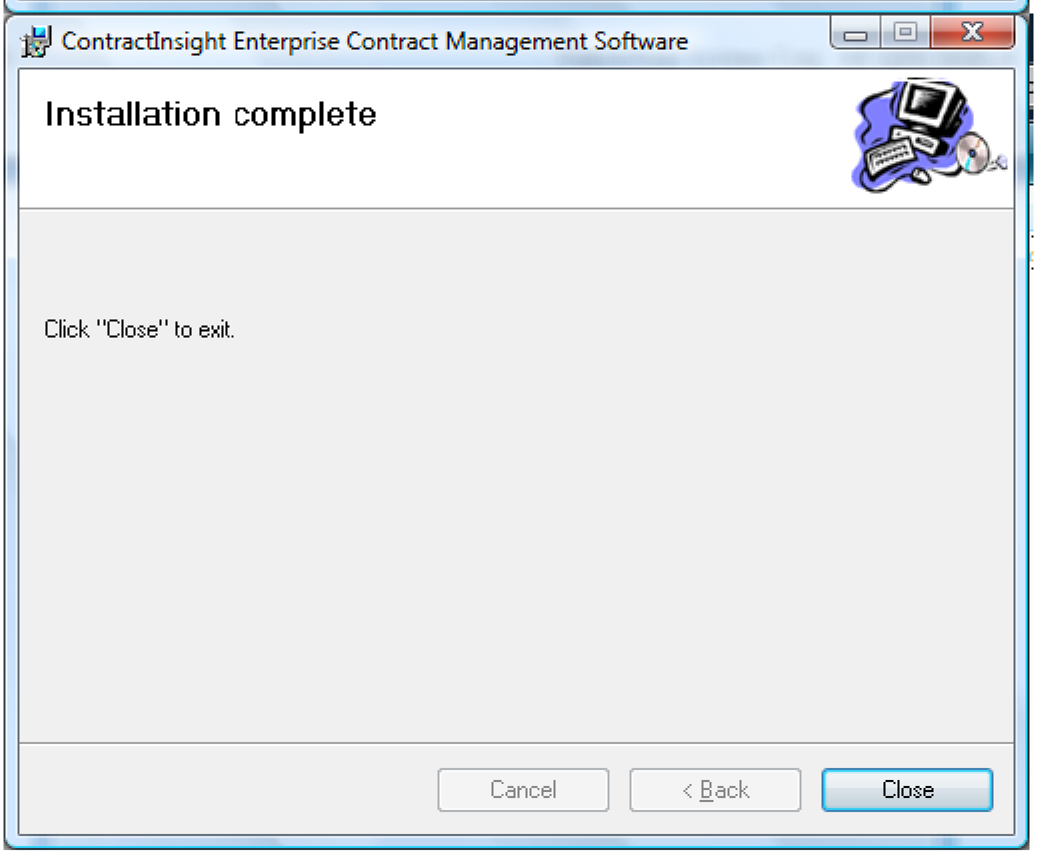
1. Log in to the web server as an administrator user on the Windows Server that has IIS installed and ready to host the Contract Insight web application. Verify that the IIS Web Services will support ASP and ASPX (.net) web application. By default IIS does not enable support for both ASP and ASPX pages (on 2003 and 2008 servers)
2. Next, locate and run the ContractInsightEnterpriseSetup.msi (name may vary) installation file provided.


3. Executed the .MSI file by double clicking on it.
4. You may be prompted to enter a sub web name (application name). You may enter ContractInsight if required.



5. Next, follow the installation procedures. Upon completion the installation wizard will confirm completion.


ContractInsight Enterprise Contract Management Software
Select Installation Address
The installer will install ContractInsight Enterprise Contract Management Software to the following virtual directory.
To install to this virtual directory, click "Next". To install to a different virtual directory, enter it below.
Virtual directory:
ContractInsight
Disk Cost...
Port:
80
Cancel
< Back
Next >


ContractInsight Enterprise Contract Management Software
Installation complete
Click "Close" to exit.
Cancel
< Back
Close

6. Locate and update the Contract Insight database connection string in the "web.config" file located in your Contract Insight IIS Web Directory (usually c:\inetpub\wwwroot\contractinsight\). Open the web.config file with note pad (text editor). Locate and set the correct database name, database server, user name, and password for your database. Save the web.config file.

```
ppSettings>
<add key="DSN" value="data source=(local);initial catalog=contractinsight;user id=sa;PASSWORD=" />
<add key="FieldWidth" value="300" />
<add key="FileUploadTimeOut" value="300" />
```

Refer to IIS Configuration Documentation provided, or email support@CobbleStoneSystems.com for IIS Configuration Assistance.

Installation of Contract Insight SQL Server Database

1. Log into the database server as an administrator user.
2. Open the Microsoft SQL Enterprise Manager. Create a new ContractInsight database on the SQL Server. Next, restore the Contract Insight database from the Contract Insight SQL database backup file (.bak) that was provided in your installation files. To learn more about restoring a database refer to your MS SQL documentation.
3. Update the database ("DSN") connection string in the "web.config" file in your Contract Insight IIS Web Directory (discussed above). Set the correct database name, database server, user name, and password for your database.

Testing the system

1. Open Internet Explorer and type 'http://localhost/' (append the IIS directory above if needed or application server name used) into the address bar and click 'Go' You will be prompted for a username and password they are as follows (or as assigned by our tech team prior to setup):
    a. Username: contract
    b. Password: master
2. Once into the system you can change the administrator password, and add users.

* denotes "D:" as the CD-ROM Drive (or alternative path to the Contract Insight data files)

Installing the Contract Insight E-Mail Notification System

Contract Insight supports an automated email notification feature. Contract Insight requires that the Windows SMTP (e-mail) services be started to permit e-mail services. Be sure to set your IIS Web SMTP Mail settings as indicated in your Microsoft IIS documentation; also be sure your SMTP server will allow relaying of e-mails from this server. SMTP should be running on the Web and Database Server if your installation has two servers. NOTE: Be sure that the servers that host the Contract Insight application can resolve your organizations e-mail address domain locally. To obtain the e-mail notification scripts and application, contact CobbleStone at support@CobbleStoneSystems.com.

Overview of Contract Insight E-mail Notification Options

Below is an overview of three email options for the Contract Insight system

Task and Contract e-mails are emailed (sent to the end-users) using an installed application that is installed on a network server (typically the IIS Web Server). A Windows Task program is installed using the Windows Task Scheduler Service that will execute the e-mailer EXE nightly to send emails. The e-mails can be sent via the local SMTP service or configured to send e-mails through another SMTP server.

Requirements:

a) Install the Microsoft .NET Framework on the network server machine (if not already installed); provided by Microsoft
b) Install the CobbleStone Task E-mail Alert application on the network server machine provided by CobbleStone
c) Configure the Microsoft Windows Task Schedule to run the task e-mailer EXE nightly (the Task Schedule should run on an local service account or admin account)(the task e-mailer .exe file is normally located in the c:\program files\cobblestone systems\task emailer\ folder)

Setting the Task E-mailer (taskemailerapp.exe.config) .config file:

1. Open the "taskemailerapp.exe.config" file (provided in the task emailer folder) with notepad, next, change the database (DSN) connection string information as needed
2. Next change the SMTPSERVER name to your networks SMTP server name
3. Next change the EMAIL from address to a local e-mail address on your network.
4. Save the .config file.
5. For additional instructions, please contact support@CobbleStoneSystems.com

Installation of the Report E-mailer Application and Escalation Tasks Job:

Report E-mailer Application: Please contact your sales representative to obtain the Report E-mailer application module

Task Escalation Application: Please contact your sales representative to obtain the task escalation application module.

Windows Active Directory Integrated Authentication:

Contract Insight Enterprise supports the ability to authenticate users in the Integrated Authentication Mode, which, enables users to use their Windows network account to access the system. To run the system using Windows Integrated Authentication mode, please contact support@CobbleStoneSystems.com for product documentation.

Windows 2003 Server and IIS 6.0

If Windows 2003 Server will be used to host the IIS Service for the Contract Insight Application, there are several settings that must be set:

Enable Parent Paths on the IIS Virtual Directory

1. From the IIS server that hosts Contract Insight, Open the Internet Service Manager in the Microsoft Management Console.
2. Right-click on the Web server in question.
3. Select Properties on the pop-up menu.
4. Click the Home Directory tab.
5. Select Configuration in the Application Settings box.
6. Click the App Options tab.
7. Select (check) the Enable Parent Paths option.
8. Click OK twice to return to the Microsoft Management Console.

Attaching Large Files on Windows 2003 Server

There are several settings that must be increase related to attaching files over 4 MB using Contract Insight hosted on Windows 2003 IIS 6.

Web.config Variable Changes

Locate the web.config file in the Contract Insight IIS Web Directory. Next, locate and increase the following timeout variables that are set in seconds (for example 15 equals fifteen seconds). You may want to double the default settings until the desired results are achieved.

Locate and increase the upload file size limitation variable (the default setting is 3000000 which is about 3 MB). Change this to whatever limit is reasonable for the types of files your users will be attaching:

Application("fileuploadsize") = "3000000"

Save the web.config file.

IIS 6.0 – Windows 2003 Changes

AspMaxRequestEntityAllowed Variable Changes

For IIS6.0 users, the **AspMaxRequestEntityAllowed** property specifies the maximum number of bytes allowed in the entity body of an ASP request. If a Content-Length header is present and specifies an amount of data greater than the value of **AspMaxRequestEntityAllowed**, IIS returns a 403 error response. This property is related in function to **MaxRequestEntityAllowed**, but is specific to ASP request. Whereas you might set the **MaxRequestEntityAllowed** property to 1 MB at the general World Wide Web Publishing Service (WWW Service) level, you may choose to set **AspMaxRequestEntityAllowed** to a lower value, if you know that your specific ASP applications handle a smaller amount of data.

Open your MetaBase.XML which is located in c:\Windows\System32\Inetsrv find the line "AspMaxRequestEntityAllowed" and change it to "1073741824".

This change does not require stopping IIS, but to make the Metabase.xml file write-able, you need to go to the IIS control panel, right click the server, select properties, and check off the box that says "allow changes to MetaBase configuration while IIS is running".

AspBufferingLimit Variable Change

Downloading files with Contract Insight hosted on IIS 6 generates the following error message: "File not found (Error 1040) Error opening 'Z:\xxx.xxx'. Error 32 the process cannot access the file because it is being used by another process." In fact, the original error raised by IIS is "Response Buffer Limit Exceeded".

Using IIS 6: If you get the above error when you click on an attachment, the attachment is larger than IIS is configured to allow. Change the AspBufferingLimit setting in Metabase.xml to a larger size. The default value is 4194304, which is about 4 MB. Change this to whatever limit is reasonable for the types of files your users will be attaching.

This change does not require stopping IIS, but to make the Metabase.xml file write-able, you need to go to the IIS control panel, right click the server, select properties, and check off the box that says "allow changes to MetaBase configuration while IIS is running".

Windows 2008 Servers (IIS 7.0)

For Windows 2008 Servers: IIS 7.0 does not have ASP and ASPX page support enabled as a default. To Enable ASP and ASPX page support please refer to this Microsoft documentation to enable ASPX / ASP.NET Web Roles: http://msdn.microsoft.com/en-us/library/ms178477.aspx

Appendix A – Additional Information

Where to find Additional Information

CobbleStone Systems, Inc. Telephone Number…………... (866) 330-0056 / (856) 939-4646

CobbleStone Systems, Inc. Fax Number……………………………………..(609) 482-8023

CobbleStone Systems, Inc. Web Site ...……........……http://www.CobbleStoneSystems.com

CobbleStone Systems, Inc. E-mail ……..…………………..info@CobbleStoneSystems.com

CobbleStone Systems, Inc. Support ………….……........support@CobbleStoneSystems.com

CobbleStone Systems, Inc. Online Learning Videos… http://www.CobbleStoneSystems.com

Appendix B – Document Change Log

Change Log

Date: 02/01/2010	**Version:** 10.0
Change Summary: • Base Draft/Version of the User Manual	
Date: 05/11/2010	**Version:** 10.1
Change Summary: • Updated and added new information/screenshots for menu changes • Updated and added new information/screenshots for data grid and table changes	
Date: 07/03/2010	**Version:** 10.2
Change Summary: • Added sections for all the aspects and uses of data grids • Updated screenshots for new user interface modifications • Added section for detailed walkthrough with Online Report Builder • Updated and added new information/screenshots for contract template creation and management • Added sections for management and utilization of dashboards	
Date: 8/5/2010	**Version:** 10.3
Change Summary: • Updated language and grammar throughout document • Changed sequence of several sections for better flow of information	
Date: 8/27/2010	**Version:** 10.4
Change Summary: • New look and feel, layout for document	
Date: 10/7/2010	**Version:** 10.5
Change Summary: • Add contract template compare documentation	